

C.L. INITIATIVES LTD

England & Wales · Charity number 1141176

Details

Status Registered

Legal form Charitable company

Company number [07530680](#)

Registered 2011-04-05

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

Contact

Address C/o Linkability Conway House
Ackhurst Business Park
Foxhole Road
Foxhole Road
PR7 1NY

Phone 07798 558 331

Email info@communitylivingmagazine.com

Website www.cl-initiatives.co.uk

Activities

Objects: TO RELIEVE THE NEEDS OF PERSONS WITH LEARNING DISABILITIES AND TO PROMOTE THEIR SOCIAL INCLUSION FOR THE PUBLIC BENEFIT BY RAISING AWARENESS AND KNOWLEDGE OF RELEVANT CURRENT ISSUES, RESEARCH AND GOOD PRACTICE

Activities: It publishes a quarterly magazine on learning disabilities "Community Living" and runs regional and national events on key topical subjects to engage all stake-holders in current practice and to involve people with learning disabilities themselves as far as possible.

Classification

- **How:** Provides Advocacy/advice/information, Sponsors Or Undertakes Research, Other Charitable Activities
- **What:** Education/training, Disability
- **Who:** People With Disabilities

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£29,045	£38,633	-	-
2024-03-31	£27,650	£36,687	-	-
2023-03-31	£77,250	£37,106	-	-
2022-03-31	£20,045	£19,072	-	-
2021-03-31	£20,347	£16,499	-	-

Trustees

Name	Role	Appointed
Dr Rhidian Hughes		2025-02-26
Jo Clare		2022-02-04
Michael Donlevy		2025-02-26
SUE PEMBERTON		2011-04-05
Sean Michael Kelly		2019-10-28
Shaun Webster		2025-02-26

C.L. INITIATIVES LTD

England & Wales - Charity number 1141176

Accounts

**C.L. INITIATIVES LTD
(A COMPANY LIMITED BY GUARANTEE)**

**INCORPORATED 15 FEBRUARY 2011
CHARITABLE REGISTRATION 5 APRIL 2011**

**England and Wales:
Company: 7530680
Charity: 1141176**

**PART 1. TRUSTEES' REPORT AND FINANCIAL
STATEMENTS (UNAUDITED ACCOUNTS)
FOR THE YEAR ENDED 31 MARCH 2025**

**PART 2. COMMUNITY LIVING: THE MAGAZINE ABOUT
LEARNING DISABILITIES**

C.L. INITIATIVES LTD (A COMPANY LIMITED BY GUARANTEE)

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PART 1.

TRUSTEES' REPORT AND FINANCIAL STATEMENTS (UNAUDITED ACCOUNTS) FOR THE YEAR ENDED 31 MARCH 2025

1.1 TRUSTEES, REFERENCE AND ADMINISTRATIVE DETAILS

TRUSTEES

Jo Adshead (Chair)
Resigned 17.12.2024.

Jo Clare (Treasurer)

Michael Donlevy
Appointed: 26.02.2025

Rhidian Hughes (Chair)
Appointed: 26.02.2025

Seán Kelly (Assistant Treasurer)

Duncan Mitchell
Resigned: 24.10.2025

David Naden
Resigned: 17.12.2024

Shaun Webster
Appointed: 26.02.2025

REFERENCE AND ADMINISTRATION DETAILS

Charity number:
1141176

Company number:
7530680

Registered office:
Conway House
Ackhurst Business Park
Foxhole Road
Chorley
Lancashire
PR7 1NY

Independent accountant:

Revalo Solutions
261 The Green
Ecclestone
Lancashire
PR7 5TF

Banker:

HSBC
26 Market Street
Chorley
Lancashire
PR7 2RX

Insurance (Ansvar combined liability):

Ansvar Insurance
Ansvar House
St Leonards Road
Eastbourne
East Sussex
BN21 3UR

1.2 STRUCTURE AND GOVERNANCE

C. L. Initiatives Ltd is constituted as a Company Limited by Guarantee and a Registered Charity. Members of the governing board are Directors of the Company as well as being Trustees of the Charity. (The term board members is used to cover both roles.)

The governing document is the Memorandum and Articles of Association.

The charity's objects are specifically restricted to the following –

To relieve the needs of persons with learning disabilities and to promote their social inclusion for the public benefit by raising awareness and knowledge of relevant current issues, research and good practice.

Through the following activities:

- a) Publishing a magazine and disseminating to the social care sector, service users*, families and carers, educational and employment establishments and any other interested people in the wider community
- b) Developing such a magazine or other by-products which encourages all contributions, provides articles commissioned on the topics of the day, challenges those issues which hamper people from achieving their aspirations, publicises radical ideas being put into practice and encourages people to work together to produce their own solutions.
- c) Stimulating and enabling research, seminars, training events and networking events and disseminating information and learning
- d) Seeking to promote the inclusion of the voices of service users and others involved including through sponsorship, training events and support.

* Our governing document of 2011 uses the term 'service user'. Today we recognise that people draw on a wide range of social care services and support to live their best lives.

BOARD MEMBERS

Board members are recruited for their commitment, experience and skills and the gaps identified. New board members receive induction on taking office, including written materials, and ongoing development is also available based on identified needs.

GENERAL MANAGEMENT

The board manages the business through quarterly meetings and an annual general meeting to agree approve the annual accounts, review risks and set the budget. Organisational policies and approaches are informed by guidance and good practice for small charities. The structure of the organisation involves trustees sharing the workload and overall daily management.

The organisation does not directly employ its own staff, instead it commissions a paid editorial team to produce the magazine. Colleagues collaborate with trustees and the editor and administrator meet periodically with the chair.

Alongside paid contributions the editorial team have generously supported the charity with additional pro bono and voluntary contributions to support the operations and editorial activities, including that provided to disabled contributors.

The charity depends on the voluntary contributions of board members and sponsoring organisations who contribute financially. They also give suggestions and advice based on their knowledge and expertise to the Editorial Advisory Board and in written submissions to the magazine.

RISK MANAGEMENT

Risks, including financial risks, are regularly reviewed by board members with advice and support taken from editorial colleagues and external sources.

This year board members confirm the charity has sufficient reserves to maintain cash flow and the production of the magazine. Pre-payments in subscriptions and sponsorships support the organisation's cash-flow.

The charity has insurance to cover any potential liability from board members, contracted colleagues and volunteers. Board members have taken all reasonable steps to identify and manage any risks associated with the Charity's activities, any beneficiaries, and its work products and reputation in support of delivering its objects.

EDITORIAL ADVISORY BOARD

Community Living convenes regular Editorial Advisory Board meetings. These forums provide external perspective, discussion and suggestions for the topics the Editor might choose to pursue in the magazine. Membership of the Editorial Board is mainly drawn from representatives of organisational sponsors. In addition open dialogue and feedback between Editor and advisory board members is encouraged.

SPONSORS

Sponsors are funders of the magazine and are usually charitable organisations working in the field of learning disabilities with a strong value base and good reputations for service delivery and/or their contributions to the sector.

Sponsors have exclusive access to Community Living Magazine online in the flipbook form.

We are very grateful to all individuals and organisation who have kindly sponsored the magazine this year.

In 2024/25 our core sponsors are:

- EveryStory (formerly Aurora Nexus)
- Elfrida Society
- Integrate
- Lancashire Learning Disability Consortium
- Learning Disability Network London
- Link-Ability

Our associate sponsors are:

- Beyond Limits
- Certitude
- Choice Support
- Imagine, Act and Succeed
- Paradigm
- Thera Trust
- United Response

2024/25 PRINCIPLE BUSINESS ACTIVITIES

Community Living is published quarterly and aims to fully maximise our reach to support inclusion, to promote equality and to challenge assumptions about learning disability. The magazine seeks to reach people with learning disabilities, their supporters and allies, support workers, commissioners as well as educational and employment staff and other interested people with an interest in full societal inclusion.

The magazine went fully digital (and ceased to be printed) from January 2024. As an digital first magazine we have now been able to provide full colour graphics throughout. There has also been a saving in printing costs which has helped to partially offset other increased costs.

The magazine promotes the inclusion of people with learning disabilities in every aspect of society. This year the magazine has promoted raising awareness of current issues, research, and good practice, alongside current policy updates and legal commentary. The magazine reports on new approaches being put into practice across the UK and further abroad.

As part of our strategy we have actively pursued and secured contributors with lived experience, especially of learning disability. Alongside the magazine encourages

contributions and commissions articles from a wide range of writers family members including parent carers and siblings, support staff, senior professionals and academics.

This year we have also broadened our editorial scope to reflect early years/SEND, transitions to adulthood and other rights-based topics and challenges that face people with a learning disability.

Some writers require assistance with their contributions and we are grateful to those who have provided this support, especially when done on a voluntary basis.

Community Living encourages readership of the magazine and further discussion of current issues via its website and its social media presence on Linked-In, Blue Sky and Facebook. Community Living is open access and makes all articles free to read in order to drive engagement and raise the profile of the issues covered in the magazine. Our sponsors have access to an exclusive digital flipbook version.

Community Living values its relationships with other groups including disabled people's organisations, self-advocacy groups, family networks and provider organisations.

Public Benefit Statement

Board Members believe that the activities listed above satisfy the requirement of the Charity to show that it meets public benefit requirements in accordance with section 4 of the Charities Act 2006.

1.3 FINANCE

Financial Overview

The budget is set by the Board and financial performance is monitored at regular meetings. The Annual Accounts are reviewed and adopted at the Annual General Meeting.

The Chair, the Treasurer and the Assistant Treasurer provide regular financial oversight and are mandated to manage payments from the charity's bank account

Financial Viability

Board members consider that although conditions remain difficult, our business and financial plan going forward remains viable. Alongside retaining committed colleagues, volunteers, subscribers and individual sponsors the charity places significant reliance on the generous financial support of organizational sponsors.

Increased costs and intentional investments from unrestricted reserves has led to financial deficits in the last two years (2023-2024 and 2024-2025). The board are actively taking steps to minimise such actions in the future, especially as they relate to core business costs. Board members continue to seek appropriate new sponsors as part of assuring long-term viability.

Reserves policy

Trustees have a responsibility to ensure the charity is financially sustainable and able to meet its objectives. We hold small working reserves to manage cash flow and to:

- Provide a safeguard against unexpected financial difficulties.
- Ensure continuity of key charitable activities in the event of reduced income.
- Allow time to adjust to changes in funding or expenditure.
- Meet unavoidable one-off costs.

Reserves are reviewed by trustees at least annually as part of budget-setting and more frequently as required. In addition trustees have created a designated fund.

The Rosemary Trustam Designated Fund

Community Living has benefited from a legacy of the late Rosemary Trustam who was a former publisher of the magazine. Trustees have designated funds from the legacy of Rosemary Trustam for Community Living to ensure that specific charitable activities are undertaken in her name.

Forward view

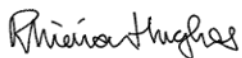
The charity aims to continue to further develop its reach and networks to maximise the contributions and readership of the magazine in all its forms and to support its longer-term viability.

Community Living provides the highest quality content. The magazine retains its broad remit of striving for full and better lives for people with learning disabilities and their families. We particularly recognise the work of Saba Salman as Editor and the editorial team of paid colleagues whose high quality work enables the charity to deliver our charitable objects. Board members are also hugely grateful to all who have contributed written articles, images, marketing support and financial resources alongside voluntary contributions. We continue to pay tribute to the work of the late Rose Trustam in her role of publisher and the firm foundation she created for the charity to continue to champion the rights of people with learning disabilities. Since then trustees are also indebted to Jo Adshead in her role as chair of the charity through to the 2024 annual general meeting and our trustees that have served and retired since our last annual report.

DECLARATION

The Trustee Directors declare that they have approved the trustee report above.

Signature:



Name:
Rhidian Hughes

Position:
Chair

Date:
24 October 2025

1.4 STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDING 31 MARCH 2025, BALANCE SHEET AND AUDIT EXEMPTION STATEMENT

	2024/25	2023/24
<u>Incoming resources from generated funds</u>	£	£
Income from charitable activities	-	-
Donations	29,029	27,636
Bank interest	16	14
	29,045	27,650
<u>Resources expended in charitable activities</u>		
Magazine production and dissemination	38,633	36,687
Direct seminar costs	0	0
Governance costs	0	0
Depreciation	0	0
Total Resources expended	38,633	36,687
Net resources and fund balances as at 31/3/25	(9,588)	(9,037)
<i>SUMMARY INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 MARCH</i>		
Income	29,045	27,650
Total expenditure from income funds	38,633	36,687
Net loss for the year	(9,588)	(9,037)
STATEMENT OF GAINS AND LOSSES		
Net income for the year	(9,588)	(9,037)

BALANCE SHEET - AS AT 31 MARCH 2025		
	2024/25	2023/24
Fixed Assets		
Tangible assets	0	0
Investments	0	0
Total	0	0
Current Assets		
Debtors and prepayments	-	-
Cash at bank and in hand	33,735	43,221
Total Current Assets	33,735	43,221
Creditors	1,150	1,048
Net Current Assets	32,585	42,173
funded by:		
Reserves	22,173	51,210
Rosemary Trustam Designated Fund surplus/(Deficit)	20,000 (9,588)	- (9,037)
	32,585	42,173

Audit Exemption Statement

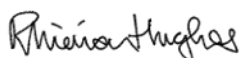
For the year ending 31 March 2025 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- the members have not required the company to obtain an audit of its accounts for the year in question in accordance with section 476,
- the directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts,
- these accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

Signed on behalf of trustee directors:

Signature:



Name:
Rhidian Hughes

Position:
Chair

Date:
24 October 2025

PART 2. COMMUNITY LIVING: THE MAGAZINE ABOUT LEARNING DISABILITIES

2.1 ETHOS, AUDIENCE AND EDITORIAL STRATEGY

Our ethos

Community Living is an independent, quarterly magazine. We produce a free-to-view website and a paid-for digital edition, both relaunched as part of an ambitious redesign in 2023. We support inclusion, promote equality and challenge assumptions about learning disability. Our editorial ethos is driven by our belief that people have the right to thrive in their communities. While the landscape has changed over years and our coverage has changed accordingly - there is no longer a large scale movement of adults from hospitals into communities - our founding ethos remains. The focus on inclusion, rights and equality remains central to our purpose.

Our audience

Our wide readership includes family members, people with learning disabilities themselves, and professionals – from care providers to advocacy groups, support/healthcare workers, legal/welfare experts, academics. We target a mainstream audience rather than an informed or academic one. To do this means scaling up our profile, broadening our reach, and reflecting wider cross-sector demands for collaborative, integrated approaches to support (like social care's role within the wider local government context, in relation to housing, health, education, training etc).

Editorial strategy

We position the magazine as being for anyone interested in learning disability, and we cover good practice as well as issues that undermine people's ability to thrive in their communities.

Our editorial is mindful of:

- reaching out to younger people/families means we might 'bring readers with us' as they navigate the adult system in years to come
- rise of the family-led campaign movement and high profile of family influencers (e.g. care and support providers often have 'family representative' bodies)
- resurgence of self-advocacy, e.g. self-advocates who talk about their 'whole lives' alongside the housing/care aspects, like self-advocate columnist Shalim – vocal about the impact of his childhood experience (school and family)
- growing awareness of 'transition', raised at editorial advisory board meetings
- popularity of newer organisations with diverse memberships combining families, self-advocates, professionals and academics
- popularity of associations with disability support provider members whose beneficiaries span a wide demographic
- increasing calls for a 'whole family' approach to support.

Our magazine front covers consistently meet with positive feedback. Our achievements in editorial are not just words but with the imagery we deliberately choose to accompany

pieces. We deliver top class journalism in a subject area comparatively ignored in mainstream media and strong eye-catching images inside and on the front.

2.2 TIMELINE AND EDITORIAL DEVELOPMENT

1987 Community Living's launch follows the first closure of a long-stay institution, Starcross Hospital in Devon. The new era of "community care" services is behind founder and journalist Elinor Harbridge idea of a title to champion people's rights - a groundbreaking concept. Harbridge appoints social worker, David Brandon as editor.

1987-2022 More long-stay hospitals close. But institutional approaches remain; full citizenship for people is still not a reality. Our drive for equality is upheld by editors David Brandon, Elinor Harbridge, Andrew Holman and Simon Jarrett, and the latter develops our online and social (and we retain him as our arts correspondent).

2000s Charity Elfrida Society becomes publisher before independent publisher and campaigner Rose Trustam takes on the role. Community Living is published by a charitable board, CL Initiatives, most recently headed by publisher Jo Adshead, and supported by an editorial advisory board.

2022 Saba Salman, an award-winning freelance journalist, is appointed our fifth editor, with a remit to develop the title editorially.

and financially. The strategy prioritises digital over print, professionalises our journalistic processes, harnesses social and digital and recruits new contributors. The ambitious, full colour redesign with production editor Christy Lawrance and our new digital producer Steph Gray delivers a web launch and new online strategy. We consolidate the move from a subscription to a sponsorship model, grow our social media presence thanks to the appointment of administrator Christine Mottley.

2023 Ex-Guardian writer Mary O'Hara is appointed a regular freelance, winning our first ever journalism award.

2.3 KEY ACHIEVEMENTS IN 2024-2025

2024-2025 sees the magazine go fully digital, launching a free newsletter We cease print in line with the majority of media, supporting the board's aim to boost our financial health. Expert journalist and researcher George Julian joins as court reporter.

We explore grant funding and, with a modest commissioning budget (our rate is half the industry average) the editor secures articles from national news journalists for the spring 2025 issue – alongside the payment-free contributions from experts.

CORE CONTRIBUTORS

Editorial team

- Saba Salman | Editor
- Steph Gray | Digital producer
- Christine Mottley | Administrator
- Christy Lawrance | Production Editor

Regular contributors (every issue)

- Robin Meader | Cartoonist
- Seán Kelly | Interviewer and photographer
- Charlie Callanan | Welfare writer
- George Julian | Court reporter

- Mary O'Hara | Opinion writer
- Simon Jarrett | Arts correspondent
- Susanna Shapland | History writer
- Shalim Ali, Ian Goldsworthy, Chris Hatton and Jan Walmsley | Opinion writers (on rotation)

Alongside our regular contributors we were also pleased to work with occasional writers including national journalists Sam Carlisle, Hannah Fern and John Harris.

C.L. INITIATIVES LTD

England & Wales - Charity number 1141176

Accounts

C.L. INITIATIVES LTD
(A COMPANY LIMITED BY GUARANTEE)
INCORPORATED 15TH FEBRUARY 2011
CHARITABLE REGISTRATION 5TH APRIL 2011

Company registration no. 7530680 (England and Wales)
Charity Registration no 1141176

ANNUAL FINANCIAL STATEMENTS
(UNAUDITED ACCOUNTS)
FOR THE YEAR ENDED 31ST MARCH 2024

Company registration no. 7530680 (England and Wales)
Charity Registration no 1141176

**C.L. INITIATIVES LTD
(A COMPANY LIMITED BY GUARANTEE)**

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Company registration no. 7530680 (England and Wales)
Charity Registration no 1141176

C.L. INITIATIVES LTD
(A COMPANY LIMITED BY GUARANTEE)

Company Directors and Charity Trustees:

Jo Adshead - chair
David Naden
Susan Pemberton
Jo Clare
Duncan Mitchel
Sean Kelly

Charity number: 1141176
Company number: 7530680

Registered office: C/o Link-Ability Conway House
Ackhurst Business Park
Foxhole Road
PR7 1NY

Independent Accountant Revalo Solutions Ltd
261, The Green
Ecclestone
PR7 5TF

Bankers: HSBC,
26, Market St,
CHORLEY,
LANCASHIRE
PR7 2RX

Insurance Brokers: Ansvar Insurance
Ansva House
St Leonards Road
Eastbourne
East Sussex BN21 3UR

Insurance Company

Ansvar Insurance combined liability

Names of the charity trustees who manage the charity and who served during the year

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Jo Adshead	Chair		Board Directors
2	David Naden			
3	Susan Pemberton			
4	Sean Kelly			
5	Duncan Mitchel			
6	Jo Clare			

Structure, governance and management

C. L. Initiatives Ltd is constituted as a Company Limited by Guarantee so that the Board Directors are also the Charity's trustees. The governing document is the Memorandum and Articles of Association.

Appointed by the Board Directors to secure a Board equipped to manage the charity, Directors are chosen for essential skills are financial, management, learning disabilities social care sector and journalistic experience. In the absence of desirable skills of IT, marketing and communications skills and experience, and fund-raising, the Board have invited to meetings relevant professionals and networked to bring those skills to governance decisions and have sought volunteer expert support.

The structure of the organisation delegates the day-to-day management to the current Chair.

The Board manages the business through its board meetings and an annual meeting to agree its annual business plan and review its risk management. The chair and editor communicate regularly by phone and email with a more prolonged meeting additionally a couple of times a year.

Relationships with related parties:

The main relationships are with the Community Living magazine editorial board members and sponsors of the magazine and charity. All of them are charitable organisations working in the field of learning disabilities, with good reputations for their service delivery and contributions to the sector, and strong values base in their

practice in line with the charity's. They contribute to the charity through their partnership activity, contributions to the editorial board and the magazine. Integrate (Preston and Chorley) Ltd, Link-Ability, LDN London, Thera Trust, LLDC, Choice Support, The Elfida Society, Avenues, Beyond Limits, Certitude London, United Response Aurora Nexus and Imagine Act and Succeed are the sponsors of the magazine.

There is a wider network of more informal relationships with organisations and local groups which support the delivery of the charitable objects.

Trustees' consideration of major risks and the system and procedures to manage them.

The main risks are managed by the high level of knowledge, expertise, and connectivity with the learning disabilities sector amongst the Board members of the learning disabilities field and the magazine's editorial board, ensuring any possible editorial risks are managed. A qualified journalist/editor works with the commissioning editor also a qualified, professional and award winning journalist. This has proved extremely successful ensuring competence in managing any potential risks, backed by the expert editorial board.

The Board recognized the need to professionalise roles within the organisation and as such have funded a business administrator and accountant.

The financial risks of the organisation are closely monitored and have some back-up from private donations and the chair's administration of the activity as a volunteer. Cash flow is managed by the pre-payments in subscriptions and sponsors' contributions. The charity has insurance to cover any potential liability from employed or volunteer staff.

C. L. Initiatives trustee directors believe they have taken all reasonable steps to identify and manage any risks associated with the Charity's activities, any beneficiaries, and its work products and reputation.

Principal business activities:

To promote the equality of citizenship and the inclusion of people with learning disabilities in every aspect of society through raising awareness and knowledge of current issues, research, and good practice, and to promote their inclusion and contributions for the public benefit through the following activities: -

- a) Publishing a magazine and disseminating it to the social care sector, service users, families and carers, educational and employment establishments, and any other interested people in the wider community, including through the website and social media.
- b) Developing such a magazine or other by-products which encourages all contributions, provides articles commissioned on the topics of the day, challenges those issues which hamper people from achieving their aspirations, publicises radical ideas being put into practice and encourages people to work together to produce their own solutions.
- c) Stimulating and enabling research, seminars, training events and networking events and disseminating information and learning
- d) Seeking to promote the inclusion of the voices of service users and others involved including through sponsorship, training events and support

Summary of the main activities undertaken for the public benefit in relation to these objects

Publishing the Community Living magazine quarterly, containing good practice examples, current policy comment and updates, useful books and resources, and good updated information on welfare rights and community care law.

Disseminating additional brief information and news through an electronically distributed free to view articles and through Facebook and Twitter, and on the website; we also respond to subscribers' enquiries as a source of information and advice and to such on social media.

The website continues to offer subscribers a digital magazine edition and access to past articles. We have the potential to extend the coverage through additional articles and adverts. It also continues to assist the administrative burden through an initial automatic prompt for renewal and the facility to pay using credit cards. This also continues to add the connectivity of Twitter feed and Facebook.

Networking and encouraging constituents to share practice and raise issues to share more widely – both with face-to-face visits and through email and phone contacts - which has resulted in the development of connections with several family carers and social media links to closed networks.

Investigative writing to research and inform including interviews.

Members of the editorial and trustees board include links specifically to local self-advocacy groups and family members with learning disabilities

Public Benefit statement

The trustees believe that the activities listed above satisfy the requirement of the Charity to show that it meets public benefit requirements in accordance with section 4 of the Charities Act 2006

Contributions made by volunteers and others

The charity depends on the major voluntary contributions of the trustees in assisting its operations.

Sponsors contribute their knowledge and expertise to the editorial board and in wider contributions, as well as the financial support to the magazine supporting joint charitable objectives, and their engagement with and support of the magazine and the other activities. Some private sponsorship assists also, which includes direct donations. This support means that income raised can be wholly put to the pursuit of its objects and towards subsidizing costs for service users and carers to try to maximize the number who benefit.

Summary of the main achievements of the charity during the year

- a) The magazine has published quarterly across the year with some continued in its sponsorship base and active marketing. Trustee and editorial board member Jo Clare has again generously given time and resource towards successfully securing new sponsors for the magazine. This has enabled the completion of the planned strategic move towards an all sponsorship model for the magazine.
- b) The charity continues to make connections with carers through social media.
- c) A previous decision to provide more free to view articles has proved not to be detrimental to sponsorship numbers. It has been most pleasing to note the encouraging trend towards much higher levels of interest in articles published online. This has continued to improve over the year.
- d) Several visits to projects continue to lead to articles directly informed by service users and more reflective of their voices and the continued involvement of a woman with learning disabilities as one of the regular column contributors as well as the regular cartoon contribution from a man with learning disabilities.
- e) The Facebook page and Twitter accounts have continued to develop an increased readership and promote the values and concerns of the charity which widens the awareness of the charity's work.

Financial review

The budget is set with the Board and financial performance is monitored to this plan at Board meetings and is managed by the chair operationally supported by one of the Directors. Two Directors who live in the North-West are signatories for the bank accounts and it was agreed that the chair will manage the day-to-day operations using internet banking which is reported to the Board meetings.

It has been well recognized by the Board that the professionalisation of the magazine is required in order to secure its growth into the future. Agreement was made in the year for business administration and accountancy to become paid roles.

This year the gap in funding on the magazine production and receipts was managed by the absence of printing costs as well as maintaining the majority of existing learning disability charity sponsors and securing new ones along with careful expenditure management within the budget.

Details of any funds materially in deficit

The Directors feel that although conditions remain difficult, the financial plan going forward remains viable. Currently the magazine activities cost more than the sponsorship income. The Directors plans to increase sponsorship have proved largely successful which will in turn has reduced the need to time consuming and less lucrative individual subscriptions while having and the aspiration to make the magazine completely free will enable the work of the charity as a 'campaign' to continue.

The overall out-turn for this year was thus a deficit of £9037. This is a slightly disappointing result. It is evident that we rely on voluntary support from directors and the charities who support the Charity. We seek to ensure that moving forwards under the continuance of the new model of sponsorship the publication becomes viable and sustainable and that current unpaid roles are fulfilled by professionals who are skilled in the areas the charity most needs.

The charity's policy on reserves

The charity does not have any significant reserves but manages its cash flow and overall business activity to manage its requirements. Any significant surplus or donated funds would be used to develop the reach of the charity through marketing activities. A small reserve of around 3 months' turnover would help the charity to direct more efforts on investment and development and increased magazine income would enable a wider commissioning of articles.

Looking forward

The charity intends to continue to develop its reach and networks to develop the readership of the magazine/publication in all its forms and its longer-term viability; to extend the coverage within the magazine to include more on the wider UK practice; to develop our service user engagement through its members; to develop more fund-raising through sponsorship. The move towards a sponsorship model and professionalization of the roles currently provided by volunteers is well underway and it is hoped that this is further developed during the coming year.

Much continues to be down to an enthusiastic committed Board and the significant voluntary contributions made by the Directors in support of the objects and activities.

Declaration:

The Trustee Directors declare that they have approved the Trustee report above

Signed on behalf of the charity's trustees:

Signature:



Name: JOSEPHINE ANNE ADSHEAD

Position:

Date: 17/12/2024

CHAIR OF TRUSTEES
AND PUBLISHER

**C.L.INITIATIVES LTD
(A COMPANY LIMITED BY GUARANTEE)
UNAUDITED ACCOUNTS**

**STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDING 31ST MARCH 2024**

	2023/24	2022/23
<u>Incoming resources from generated funds</u>	£	£
Income from charitable activities	-	-
Donations	27,636	77,247
Bank interest	14	3
	27,650	77,250
<u>Resources Expended in charitable activities</u>		
Magazine production and dissemination	36,687	37,106
Direct Seminar costs	0	0
Governance costs	0	0
Depreciation	0	0
Total Resources expended	36,687	37,106
Net resources and fund balances as at 31/3/24	(9,037)	40,144

SUMMARY INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31ST MARCH		
Income	27,650	77,250
Total expenditure from income funds	36,687	37,106
Net loss for the year	(9,037)	40,144
STATEMENT OF GAINS AND LOSSES		
Net income for the year	(9,037)	40,144

BALANCE SHEET - AS AT 31ST MARCH 2024		
	2023/24	2022/23
Fixed Assets		
Tangible assets	0	0
Investments	0	0
Total	0	0
Current Assets		
Debtors and prepayments	-	-
Cash at bank and in hand	43,221	52,219
Total Current Assets	43,221	52,219
Creditors	1,048	1,009
Net Current Assets	42,173	51,210
funded by:		
Reserves	51,210	11,066
surplus/(Deficit)	(9,037)	40,144
	42,173	51,210

See note 12 for information on a liability not specified as of no materiality.

Audit Exemption Statement

Company registration no. 7530680 (England and Wales)
Charity Registration no 1141176

For the year ending 31.3.2024 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- the members have not required the company to obtain an audit of its accounts for the year in question in accordance with section 476,
- the directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts
- these accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

Signed 

CHAIR OF TRUSTEES
AND PUBLISHER
(Director) JOSEPHINE ANNE ADSHEAD

Date: 17/12/2024

C.L. INITIATIVES LTD

England & Wales - Charity number 1141176

Accounts

C.L. INITIATIVES LTD
(A COMPANY LIMITED BY GUARANTEE)
INCORPORATED 15TH FEBRUARY 2011
CHARITABLE REGISTRATION 5TH APRIL 2011

Company registration no. 7530680 (England and Wales)
Charity Registration no 1141176

ANNUAL FINANCIAL STATEMENTS
(UNAUDITED ACCOUNTS)
FOR THE YEAR ENDED 31ST MARCH 2023

**C.L. INITIATIVES LTD
(A COMPANY LIMITED BY GUARANTEE)**

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Company registration no. 7530680 (England and Wales)
Charity Registration no 1141176

**C.L. INITIATIVES LTD
(A COMPANY LIMITED BY GUARANTEE)**

Company Directors and Charity Trustees:

Jo Adshead - chair
David Naden
Susan Pemberton
Jo Clare
Duncan Mitchel
Sean Kelly

Charity number: 1141176
Company number: 7530680

Registered office: C/o Link-Ability Conway House
Ackhurst Business Park
Foxhole Road
PR7 1NY

Independent Accountant Revilo Solutions Ltd
261, The Green
Ecclestone
PR7 5TF

Bankers: HSBC,
26, Market St,
CHORLEY,
LANCASHIRE
PR7 2RX

Insurance Brokers: Ansvar Insurance
Ansva House
St Leonards Road
Eastbourne
East Sussex BN21 3UR

Insurance Company

Ansvar Insurance combined liability

Names of the charity trustees who manage the charity and who served during the year

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Jo Adshead	Chair		Board Directors
2	David Naden			
3	Susan Pemberton			
4	Sean Kelly			
5	Duncan Mitchell			
6	Jo Clare			

Structure, governance and management

C. L. Initiatives Ltd is constituted as a Company Limited by Guarantee so that the Board Directors are also the Charity's trustees. The governing document is the Memorandum and Articles of Association.

Appointed by the Board Directors to secure a Board equipped to manage the charity, Directors are chosen for essential skills are financial, management, learning disabilities social care sector and journalistic experience. In the absence of desirable skills of IT, marketing and communications skills and experience, and fund-raising, the Board have invited to meetings relevant professionals and networked to bring those skills to governance decisions and have sought volunteer expert support.

Policies are informed by the values-base of the organisation with a trustee induction pack and role descriptions forming part of the introduction of new trustees, with individual support from the chair and from other trustees, depending on skills needs.

The structure of the organisation delegates the day-to-day management to the current Chair.

The Board manages the business through its quarterly meetings and an annual meeting to agree its annual business plan and review its risk management. The chair and editor communicate regularly by phone and email with a more prolonged meeting additionally a couple of times a year.

Relationships with related parties:

The main relationships are with the Community Living magazine editorial board members and sponsors of the magazine and charity. All of them are charitable organisations working in the field of learning disabilities, with good reputations for their service delivery and contributions to the sector, and strong values base in their practice in line with the charity's. They contribute to the charity through their partnership activity, contributions to the editorial board and the magazine and their organizations have the benefit of bulk magazines which they can disseminate internally.

There is a wider network of more informal relationships with organisations and local groups which support the delivery of the charitable objects.

Trustees' consideration of major risks and the system and procedures to manage them.

The main risks are managed by the high level of knowledge, expertise, and connectivity with the learning disabilities sector amongst the Board members of the learning disabilities field and the magazine's editorial board, ensuring any possible editorial risks are managed.

Award winning author and journalist, Saba Salman worked alongside retiring editor Simon Jarrett until the summer of 2022, taking over the role fully in the autumn.

The Board recognise the need to professionalise roles within the organisation and as such agreed to fund a business administrator and accountant. This move will reduce the reliance on volunteers.

The financial risks of the organisation are closely monitored. Cash flow is managed by the pre-payments in subscriptions and sponsors' contributions. The charity has insurance to cover any potential liability from employed or volunteer staff. The organisation benefitted financially in the year from the substantial legacy from the former Chair and Publisher Rosemary Trustam.

It is recognised that there is a potential risk to the magazine's income in the planned move to a digital only publication. It is believed that this has been mitigated through discussions with current sponsors who are in approval of the planned development. Subscribers have also been notified and have had the benefits of quality digital articles alongside the usual print publication during a transition period.

C. L. Initiatives trustee directors believe they have taken all reasonable steps to identify and manage any risks associated with the Charity's activities, any beneficiaries, and its work products and reputation.

Principal business activities:

To promote the equality of citizenship and the inclusion of people with learning disabilities in every aspect of society through raising awareness and knowledge of current issues, research, and good practice, and to promote their inclusion and contributions for the public benefit through the following activities: -

- a) Publishing a magazine and disseminating it to the social care sector, service users, families and carers, educational and employment establishments, and any other interested people in the wider community, including through the website and social media.
- b) Developing such a magazine or other by-products which encourages all contributions, provides articles commissioned on the topics of the day, challenges those issues which hamper people from achieving their aspirations, publicises radical ideas being put into practice and encourages people to work together to produce their own solutions.
- c) Stimulating and enabling research, seminars, training events and networking events and disseminating information and learning.

- d) Seeking to promote the inclusion of the voices of service users and others involved including through sponsorship, training events and support.

Summary of the main activities undertaken for the public benefit in relation to these objects

Publishing the Community Living magazine quarterly, containing good practice examples, current policy comment and updates, useful books and resources, and good updated information on welfare rights and community care law.

Disseminating additional brief information and news through an electronically distributed free to view articles and through Facebook and Twitter, and on the website; we also respond to subscribers' enquiries as a source of information and advice and to such on social media.

The website continues to offer subscribers a digital magazine edition and access to past articles. We have the potential to extend the coverage through additional articles and adverts. It also continues to assist the administrative burden through an initial automatic prompt for renewal and the facility to pay using credit cards. This also continues to add the connectivity of Twitter feed and Facebook.

Networking and encouraging constituents to share practice and raise issues to share more widely – both with face-to-face visits and through email and phone contacts - which has resulted in the development of connections with several family carers and social media links to closed networks.

Investigative writing to research and inform including interviews.

Members of the editorial and trustees board include links specifically to local self-advocacy groups and family members with learning disabilities.

Public Benefit statement

The trustees believe that the activities listed above satisfy the requirement of the Charity to show that it meets public benefit requirements in accordance with section 4 of the Charities Act 2006

Contributions made by volunteers and others

The charity depends on the major voluntary contributions of the trustees in assisting its operations. These include not only the chair's work in managing the operations and the contributions of all in negotiating free articles and/or reporting and writing for the magazine and marketing it with colleagues, but also on the specific voluntary contributions through volunteers assisting at the seminars, in supporting admin work and in conference attendance and reporting. During the year we were pleased to be in a position to enlist the support of a part-time, paid administrator.

Sponsors contribute their knowledge and expertise to the editorial board and in wider contributions, as well as the financial support to the magazine supporting joint charitable objectives, and their engagement with and support of the magazine and the other activities. Some private sponsorship assists also, which includes direct donations. This support means that income raised can be wholly put to the pursuit of its objects and towards subsidising costs for service users and carers to try to maximize the number who benefit.

Trustee, Jo Clare offered additional voluntary support as sponsorship lead in the year. Jo, proposed and presented a new sponsorship model which was agreed by the Board. This led to reputable organisations being approached and a number have since agreed to become full or associate sponsors.

Summary of the main achievements of the charity during the year

- a) The magazine has published quarterly across the year with some continued small increase in its subscription base and active marketing. Trustee and editorial board member Jo Clare generously gave time and resource towards successfully securing new sponsors for the magazine. This has enabled the continuance of the planned strategic move towards an all sponsorship model for the magazine.
- b) The charity continues to make connections with carers reflected in increased family carer subscriptions – helped by the subsidised cost for carers and connectivity through social media.
- c) General administration tasks and the management of the website, social media, and subscriptions is now provided by a paid administrator.
- d) Free to view articles have continued to prove popular with high levels of interest.
- e) There is continued involvement of people experiencing learning disability as regular column contributors as well as the regular cartoon contribution from a man also experiencing learning disability.
- f) The Facebook page and Twitter accounts have continued to develop an increased readership and promote the values and concerns of the charity which widens the awareness of the charity's work. This has been enhanced by the contribution of the paid administrator.

Financial review

The budget is set with the Board and financial performance is monitored to this plan at Board meetings and is managed by the chair operationally supported by one of the Directors. Two Directors who live in the North-West are signatories for the bank accounts and it was agreed that the chair will manage the day-to-day operations using internet banking which is reported to the Board meetings.

Link-Ability gives support to dispatch of the magazine, whilst the editor concentrates on the magazine content and liaising with the production editor.

Further professionalisation of the magazine has been led by the professional journalist, Saba Salman who has overseen the redevelopment of the website. This will support the planned move towards a digital only publication.

The careful management of the budget continued in the year. Financial pressures were relieved when a legacy from the late Rose Trustam was received. This alongside the additional sponsors has supported the move towards paid roles for the administration and professional accountancy.

Details of any funds materially in deficit

The Directors feel that the financial and strategic plan going forward remains viable. Currently the magazine's activities cost more than its direct subscription income, so the sponsorship remains vital to our viability. The Directors plans to increase sponsorship have proved successful which will in turn has reduced the need to time consuming and less lucrative individual subscriptions while having the aspiration to make the magazine completely free will enable the work of the charity as a 'campaign' to continue.

The overall out-turn for this year was thus a surplus of £40,144. We seek to ensure that moving forwards under a new model of sponsorship the publication is viable and sustainable and that current unpaid roles are fulfilled by professionals who are skilled in the areas the charity most needs.

The charity's policy on reserves

The charity does not have any significant reserves but manages its cash flow and overall business activity to manage its requirements. Some sponsors pay for the whole year or half the year in advance and subscriptions are also mainly paid annually in advance. Any significant surplus would be used to develop the reach of the charity through marketing activities. A small reserve of around 3 months' turnover would help the charity to direct more efforts on investment and development and increased magazine income would enable a wider commissioning of articles.

Looking forward

The charity intends to continue to develop its reach and networks to develop the readership of the publication and its longer-term viability; to extend the coverage within the magazine to include more on the wider UK practice; to develop our service user engagement through its members; to develop more fund-raising through sponsorship. The move towards a sponsorship model and professionalisation of the roles currently provided by volunteers has been partially completed and it is hoped that this is further developed during the coming year. A move to a digital only publication in the coming year remains high on the agenda. Much continues to be down to an enthusiastic committed Board and the significant voluntary contributions made by the directors in support of the objects and activities.

Declaration:

The Trustee Directors declare that they have approved the Trustee report above

Signed on behalf of the charity's trustees:

Signature: 

Name: JOSEPHINE ADSHEAD

Position: Date: 18/12/2023

CHAIR OF TRUSTEES

C.L.INITIATIVES LTD
(A COMPANY LIMITED BY GUARANTEE)
UNAUDITED ACCOUNTS

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDING 31ST MARCH 2023

	2022/23	2021/22
<u>Incoming resources from generated funds</u>	£	£
Income from charitable activities	-	-
Donations	77,247	20,044
Bank interest	3	1
	77,250	20,045
<u>Resources Expended in charitable activities</u>		
Magazine production and dissemination	37,106	19,072
Direct Seminar costs	0	0
Governance costs	0	0
Depreciation	0	0
Total Resources expended	37,106	19,072
Net resources and fund balances as at 31/3/23	40,144	973
<i>SUMMARY INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31ST MARCH</i>		
Income	77,250	20,045
Total expenditure from income funds	37,106	19,072
Net income for the year	40,144	973
STATEMENT OF GAINS AND LOSSES		
Net income for the year	40,144	973

BALANCE SHEET - AS AT 31ST MARCH 2023		
	2022/23	2021/22
Fixed Assets		
Tangible assets	0	0
Investments	0	0
Total	0	0
Current Assets		
Debtors and prepayments	-	-
Cash at bank and in hand	52,219	12,779
Total Current Assets	52,219	12,779
Creditors	1,009	1,713
Net Current Assets	51,210	11,066
funded by:		
Reserves	11,066	10,093
surplus/(Deficit)	40,144	973
	51,210	11,066

See note 12 for information on a liability not specified as of no materiality.


Audit Exemption Statement

For the year ending 31.3.2023 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- the members have not required the company to obtain an audit of its accounts for the year in question in accordance with section 476,
- the directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts
- these accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

Company registration no. 7530680 (England and Wales)
Charity Registration no 1141176

Signed  (Director)

Date: 18/12/2023

