

# BROADSTONE NEIGHBOURHOOD FORUM CIO

England & Wales · Charity number 1189350

## Details

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**Status** Registered

**Legal form** CIO

**Registered** 2020-05-04

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

## Contact

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**Address** 7 Golf Links Road  
Broadstone  
Dorset  
BH18 8BE

**Phone** 01202772302

**Email** [bnf@broadstoneneighbourhoodforum.org.uk](mailto:bnf@broadstoneneighbourhoodforum.org.uk)

**Website** [www.broadstoneneighbourhoodforum.org.uk](http://www.broadstoneneighbourhoodforum.org.uk)

## Activities

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**Objects:** (1) TO PROMOTE HIGH STANDARDS OF PLANNING AND ARCHITECTURE IN AND AFFECTING BROADSTONE POOLE DORSET (THE AREA).(2) TO EDUCATE THE PUBLIC IN THE GEOGRAPHY HISTORY, NATURAL HISTORY, CULTURE AND ARCHITECTURE OF THE AREA.(3) TO SECURE THE PROVISION, PROTECTION, DEVELOPMENT AND IMPROVEMENT OF FEATURES OR AREAS OF HISTORIC OR PUBLIC INTEREST IN THE AREA.IN FURTHERANCE OF THE ABOVE OBJECTS BUT NOT OTHERWISE THE TRUSTEES SHALL RUN A NEIGHBOURHOOD FORUM FOR BROADSTONE TO PROMOTE AND OR IMPROVE THE SOCIAL ECONOMIC AND ENVIRONMENTAL WELL-BEING OF THE AREA.

**Activities:** Promoting the social physical mental economic and environmental well being of the residents visitors and businesses within the neighbourhood of the Broadstone Neighbourhood Forum

## Classification

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- **How:** Provides Services, Acts As An Umbrella Or Resource Body
- **What:** Economic/community Development/employment

## Geography

- Poole

## Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£1,266	£1,453	-	-
2024-03-31	£4,736	£26,269	-	-
2023-03-31	£20,000	£9,346	-	-
2022-03-31	£49,084	£10,074	-	-
2021-03-31	£8,883	£8,763	-	-

## Trustees

Name	Role	Appointed
<b>JONATHAN RUSSELL SAUNDERS</b>	Chair	2020-05-04
Caroline Heather Eteen Bliss		2020-05-04
Colin Eric Elkins		2022-10-17
Mark Edwin Grigsby		2025-05-19
Michael Frederick Brooke		2020-05-04
Paul Jessup		2020-05-04
Peter Sidaway		2023-06-19
Vikki Slade		2020-07-20

**BROADSTONE NEIGHBOURHOOD FORUM CIO**

England & Wales - Charity number 1189350

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# Accounts

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## Trustees' Annual Report for the period

From 01 April 2024 to 31 March 2025

Charity name: BROADSTONE NEIGHBOURHOOD FORUM CIO

Charity registration number: 1189350

### Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<b>(1) To promote high standards of planning and architecture in and affecting Broadstone Poole Dorset (the area)</b> <b>(2) To educate the public in the geography history, natural history, culture and architecture of the Area</b> <b>(3) To secure the provision protection development and improvement of the features or areas of historic or public interest in the Area</b>
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.	Para 1.17 and 1.19	<b>The revision of the Broadstone Neighbourhood Plan.</b> <b>The consideration of local planning applications and making representations where appropriate,</b> <b>Planning and implementing projects that seek to improve the neighbourhood of Broadstone</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>The trustees have had full regard to the guidance issued by the Charity Commission on public benefit.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<b>Our policy is not to give any grants to individuals but to use our funds for projects that enhance Broadstone.</b>
Policy on social investment including program related investment	Para 1.38	<b>Our policy is to improve the facilities and environment of Broadstone thereby improving the area for residents and visitors of all types.</b>

Contribution made by volunteers	Para 1.38	<b>No financial contributions as all our funds to date have come from the Local Council and other charitable organisations but the Trustees and some other residents have and are making a substantial contribution in time and expertise</b>
Other		<b>During the year a donation of £1,250 was received from a local business as a contribution towards a project.</b>

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p><b>The Council's Local Plan is currently under review and the trustees have spent time seeking the views of local residents and reviewing the Council's proposals to factor in and reflect in our Neighbourhood plan.</b></p> <p><b>In addition, a community notice board and new information boards have been erected together with information about walking and cycling routes for visitors.</b></p> <p><b>The Forum has been involved in the funding, design and implementation of a children's playground. This playground opened in the summer of 2024.</b></p> <p><b>We have worked towards creating a community space with seating and new planting.</b></p> <p><b>Further, the Forum has and is continuing to make representations to the Local Council about what it considers to be infrastructure improvements including dangerous improvements for cyclists and pedestrians together with representations about planning matters.</b></p>

### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<p><b>The revisions to the Neighbourhood Plan have been prepared</b></p> <p><b>The installation of the playground opened in the summer of 2024.</b></p> <p><b>Notice and information boards.</b></p> <p><b>New community space.</b></p>
Performance of fundraising activities against objectives set	Para 1.41	<b>Not Applicable as our funding comes from the local authority and other grant awarding bodies.</b>

Investment performance against objectives	Para 1.41	<b>Not Applicable</b>
Other		<b>Not Applicable</b>

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<b>The CIO has received grants and donations totalling £1,266 and expended £781 on projects and £672 on administration costs.</b>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<b>Reserves are held specifically for projects and earmarked for those specific projects.</b>
Amount of reserves held	Para 1.22	<b>£28,074 which includes a small amount of working capital.</b>
Reasons for holding zero reserves	Para 1.22	<b>N/A</b>
Details of fund materially in deficit	Para 1.24	<b>N/A</b>
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<b>None as we are assured funding from the Local Council as Neighbourhood Forums are statutorily recognised bodies.</b>  <b>There are plans for the creation of a Town Council and we will need to review the impact on our charity when details are understood.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	<b>Primarily the Local Council although we do seek grants from other bodies such as the Lottery. In the year a donation of £1,250 was made by an organisation as a contribution towards a project.</b>
Investment policy and objectives including any social investment policy adopted	Para 1.46	<b>All money that we receive is paid into an account in the name of the Broadstone Neighbourhood Forum CIO with Nat West Bank.</b>  <b>Any investment is directly into projects to improve the infrastructure and environment in our community.</b>
A description of the principal risks facing the charity	Para 1.46	<b>At present we are preparing a Risk policy which we shall carefully follow.</b>  <b>The principal risk would be to commission work without the funds to pay for it but this is unlikely because of our source of funding as set out above where any project seeking funding needs to be preapproved.</b>

Other		
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## Structure, Governance and Management

Description of charity's trusts:		<b>To run a neighbourhood forum</b>
Type of governing document (trust deed, royal charter)	Para 1.25	<b>A CIO constitution</b>
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	<b>A CIO</b>
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<b>With the exception of the Broadstone ward councillors who are automatically ex-officio trustees the trustees are elected for a term and selected for their skills, knowledge and experience</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<b>New trustees are given a copy of the constitution and the latest Trustees Annual Report and statement of accounts as well as Charity Commission information on running charities and being a trustee.</b>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	<b>As per our constitution.</b>
Relationship with any related parties	Para 1.51	<b>None other than with the Local Council.</b>
Other		

### Reference and Administrative details

Charity name	Broadstone Neighbourhood Forum CIO
Other name the charity uses	None
Registered charity number	1189350
Charity's principal address	7 Golf Links Road Broadstone Dorset BH18 8BE

**Names of the charity trustees who manage the charity**

	<b>Trustee name</b>	<b>Office (if any)</b>	<b>Dates acted if not for whole year</b>	<b>Name of person (or body) entitled to appoint trustee (if any)</b>
1	Jonathan Russell Saunders	Chair		
2	Michael Frederick Brooke	Vice Chair		
3	Carolyn Heather Eteen Bliss	Retired Secretary		
4	Paul Jessup	Treasurer		
5	John Watson Crawford			
6	Shirley Worner			
7	Colin Elkins			
8	Peter Sidaway	Councillor		
9	Vikki Slade	Councillor		
10	Mark Edwin Grigsby		From 19/05/2025	
11				
12				
13				
14				
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17				
18				
19				
20				

**Corporate trustees – names of the directors at the date the report was approved**

<b>Director name</b>		

**Name of trustees holding title to property belonging to the charity**

<b>Trustee name</b>	<b>Dates acted if not for whole year</b>	

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N/A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
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#### Name of chief executive or names of senior staff members (Optional information)

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## Exemptions from disclosure

Reason for non-disclosure of key personnel details

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## Other optional information

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## Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

<b>Signature(s)</b>		
<b>Full name(s)</b>	Jonathan Russell Saunders	Paul Jessup
<b>Position (eg Secretary, Chair, etc)</b>	Chair	Treasurer
<b>Date</b>	17 November 2025	



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Broadstone Neighbourhood Forum CIO

No (if any)  
1189350

CC16a

## Receipts and payments accounts

For the period from	Period start date 01/04/2024	To	Period end date 31/03/2025
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Grants	-	-	-	-	2,200
Donations	-	1,250	-	1,250	2,500
Easyfundraising	16	-	-	16	36
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>16</b>	<b>1,250</b>	<b>-</b>	<b>1,266</b>	<b>4,736</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>16</b>	<b>1,250</b>	<b>-</b>	<b>1,266</b>	<b>4,736</b>
<b>A3 Payments</b>					
Neighbourhood plan fees	-	-	-	-	2,200
Project costs	-	781	-	781	358
Office costs	672	-	-	672	1,211
Grants transferred to BCP	-	-	-	-	22,500
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>672</b>	<b>781</b>	<b>-</b>	<b>1,453</b>	<b>26,269</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>672</b>	<b>781</b>	<b>-</b>	<b>1,453</b>	<b>26,269</b>
<b>Net of receipts/(payments)</b>	<b>- 656</b>	<b>469</b>	<b>-</b>	<b>- 187</b>	<b>- 21,533</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>3,428</b>	<b>24,833</b>	<b>-</b>	<b>28,261</b>	<b>49,795</b>
<b>Cash funds this year end</b>	<b>2,772</b>	<b>25,302</b>	<b>-</b>	<b>28,074</b>	<b>28,262</b>

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Natwest bank	2,772	25,302	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	<b>2,772</b>	<b>25,302</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>	Accruals	10	-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
<i>Paul Jessup</i>	Paul Jessup	<b>17-Nov-25</b>
<i>Jonathan Saunders</i>	Jonathan Saunders	<b>17-Nov-25</b>

**BROADSTONE NEIGHBOURHOOD FORUM CIO**

England & Wales - Charity number 1189350

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# Accounts

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## Trustees' Annual Report for the period

From 01 April 2023 to 31 March 2024

Charity name: BROADSTONE NEIGHBOURHOOD FORUM CIO

Charity registration number: 1189350

### Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<b>(1) To promote high standards of planning and architecture in and affecting Broadstone Poole Dorset (the area)</b> <b>(2) To educate the public in the geography history, natural history, culture and architecture of the Area</b> <b>(3) To secure the provision protection development and improvement of the features or areas of historic or public interest in the Area</b>
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.	Para 1.17 and 1.19	<b>The revision of the Broadstone Neighbourhood Plan.</b> <b>The consideration of local planning applications and making representations where appropriate,</b> <b>Considering ways to improve the neighbourhood of Broadstone</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>The trustees have had regard to the guidance issued by the Charity Commission on public benefit.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<b>Our policy is not to give any grants to individuals but to use our funds for projects that enhance Broadstone.</b>
Policy on social investment including program related investment	Para 1.38	<b>Our policy is to improve the environment of Broadstone thereby improving the area for residents and visitors of all types.</b>

Contribution made by volunteers	Para 1.38	<b>No financial contributions as all our funds to date have come from the Local Council and other charitable organisations but the Trustees have and are making a substantial contribution in time and expertise</b>
Other		<b>During the year a donation of £2,500 was received from a local business as a contribution towards the playground project.</b>

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p><b>The Council's Local Plan is currently under review and the trustees have spent time seeking the views of local residents and reviewing the Councils proposals for the Neighbourhood plan.</b></p> <p><b>The community notice board and new information boards are well used with information about local activities and walking and cycling routes for visitors.</b></p> <p><b>The Forum has been involved in the funding, design and implementation of a children's playground. This playground opened in the summer of 2024.</b></p> <p><b>Further, the Forum has and is continuing to make representations to the Local Council about what it considers to be infrastructure improvements including dangerous improvements for cyclists and pedestrians together with representations about planning matters.</b></p>

### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<b>The revisions to the Neighbourhood Plan are being prepared</b> <b>The installation of the playground opened in the summer of 2024.</b>
Performance of fundraising activities against objectives set	Para 1.41	<b>Not Applicable as our funding comes from the local authority and other grant awarding bodies.</b>
Investment performance against objectives	Para 1.41	<b>Not Applicable</b>
Other		<b>Not Applicable</b>

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<b>The CIO has received grants and donations totalling £4,700 and expended £25,275 on projects and £994 on administration costs.</b>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<b>Reserves are held specifically for projects and earmarked for those specific projects.</b>
Amount of reserves held	Para 1.22	<b>£28,252 which includes a small amount of working capital.</b>
Reasons for holding zero reserves	Para 1.22	<b>N/A</b>
Details of fund materially in deficit	Para 1.24	<b>N/A</b>
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<b>None as we are assured funding from the Local Council as Neighbourhood Forums are statutorily recognised bodies.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	<b>Primarily the Local Council via CIL funds although we do seek grants from other bodies such as the Lottery. In the year a donation of £2,500 was made by a Broadstone business as a contribution towards the playground project.</b>
Investment policy and objectives including any social investment policy adopted	Para 1.46	<b>All money that we receive is paid into an account in the name of the Broadstone Neighbourhood Forum CIO with Nat West Bank.</b>
A description of the principal risks facing the charity	Para 1.46	<b>At present we have a detailed Risk assessment and policy which we carefully follow.</b>  <b>The principal risk would be to commission work without the funds to pay for it, but this is unlikely because of our source of funding as set out above where any project seeking funding needs to be preapproved.</b>
Other		

## Structure, Governance and Management

Description of charity's trusts:		<b>Broadstone Neighbourhood Forum CIO which carries out activities for the benefit of our community</b>
Type of governing document (trust deed, royal charter)	Para 1.25	<b>A CIO constitution</b>
How is the charity constituted? (e.g. unincorporated association, CIO)	Para 1.25	<b>A CIO</b>
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<b>With the exception of the Broadstone ward councillors who are automatically ex-officio trustees most trustees are elected for a term of 3 years maximum and selected for their skills, knowledge and experience</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<b>New trustees are given a copy of the constitution and the latest Trustees Annual Report and statement of accounts as well as Charity Commission information on running charities and being a trustee.</b>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	<b>As per our constitution.</b>
Relationship with any related parties	Para 1.51	<b>None other than with the Local Council.</b>
Other		

### Reference and Administrative details

Charity name	Broadstone Neighbourhood Forum CIO
Other name the charity uses	None
Registered charity number	1189350
Charity's principal address	100 Fairview Drive Broadstone Dorset BH18 9AR

**Names of the charity trustees who manage the charity**

	<b>Trustee name</b>	<b>Office (if any)</b>	<b>Dates acted if not for whole year</b>	<b>Name of person (or body) entitled to appoint trustee (if any)</b>
1	Jonathan Russell Saunders	Chair		
2	Michael Frederick Brooke	Vice Chair		
3	Caroline Heather Eteen Bliss	Secretary		
4	Paul Jessup	Treasurer		
5	John Watson Crawford			
6	Shirley Worner			
7	Colin Elkins			
8	Peter Sidaway			
9	Vikki Slade			
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**Corporate trustees – names of the directors at the date the report was approved**

<b>Director name</b>		

**Name of trustees holding title to property belonging to the charity**

<b>Trustee name</b>	<b>Dates acted if not for whole year</b>	

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N/A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
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#### Name of chief executive or names of senior staff members (Optional information)

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## Exemptions from disclosure

Reason for non-disclosure of key personnel details

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## Other optional information

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## Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	<i>Jonathan Saunders</i>	
Full name(s)	Jonathan Russell Saunders	
Position (e.g. Secretary, Chair, etc)	Chair	
Date	16 December 2024	



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Broadstone Neighbourhood Forum CIO

No (if any)  
1189350

CC16a

## Receipts and payments accounts

For the period from	Period start date 01/04/2023	To	Period end date 31/03/2024
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Grants	-	2,200	-	2,200	20,000
Donations	-	2,500	-	2,500	-
Easyfundraising	36	-	-	36	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>36</b>	<b>4,700</b>	<b>-</b>	<b>4,736</b>	<b>20,000</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>36</b>	<b>4,700</b>	<b>-</b>	<b>4,736</b>	<b>20,000</b>
<b>A3 Payments</b>					
Neighbourhood plan fees	-	2,200	-	2,200	-
Project costs	-	358	-	358	8,673
Office costs	1,211	-	-	1,211	673
Grants transferred to BCP	-	22,500	-	22,500	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>1,211</b>	<b>25,058</b>	<b>-</b>	<b>26,269</b>	<b>9,346</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>1,211</b>	<b>25,058</b>	<b>-</b>	<b>26,269</b>	<b>9,346</b>
<b>Net of receipts/(payments)</b>	<b>- 1,175</b>	<b>- 20,358</b>	<b>-</b>	<b>- 21,533</b>	<b>10,654</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>4,802</b>	<b>44,993</b>	<b>-</b>	<b>49,795</b>	<b>39,141</b>
<b>Cash funds this year end</b>	<b>3,627</b>	<b>24,635</b>	<b>-</b>	<b>28,262</b>	<b>49,795</b>

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Natwest bank	3,627	24,635	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	<b>3,627</b>	<b>24,635</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>	Accruals	10	-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
<i>Paul Jessup</i>	Paul Jessup	16-Dec-24
#UNKNOWN!	Jonathan Saunders	16-Dec-24

**BROADSTONE NEIGHBOURHOOD FORUM CIO**

England & Wales - Charity number 1189350

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# Accounts

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## Trustees' Annual Report for the period

From 01 April 2022 to 31 March 2023

Charity name: BROADSTONE NEIGHBOURHOOD FORUM CIO

Charity registration number: 1189350

### Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<b>(1) To promote high standards of planning and architecture in and affecting Broadstone Poole Dorset (the area)</b> <b>(2) To educate the public in the geography history, natural history, culture and architecture of the Area</b> <b>(3) To secure the provision protection development and improvement of the features or areas of historic or public interest in the Area</b>
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.	Para 1.17 and 1.19	<b>The revision of the Broadstone Neighbourhood Plan.</b> <b>The consideration of local planning applications and making representations where appropriate,</b> <b>Considering ways to improve the neighbourhood of Broadstone</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>The trustees have had regard to the guidance issued by the Charity Commission on public benefit.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<b>Our policy is not to give any grants to individuals but to use our funds for projects that enhance Broadstone.</b>
Policy on social investment including program related investment	Para 1.38	<b>Our policy is to improve the environment of Broadstone thereby improving the area for residents and visitors of all types.</b>

Contribution made by volunteers	Para 1.38	<b>No financial contributions as all our funds to date have come from the Local Council and other charitable organisations but the Trustees have and are making a substantial contribution in time and expertise</b>
Other		<b>N/A</b>

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p><b>The Council's Local Plan is currently under review and the trustees have spent time seeking the views of local residents and reviewing the Councils proposals for the Neighbourhood plan.</b></p> <p><b>In addition, a community notice boards and new information boards have been erected together with information about walking and cycling routes for visitors.</b></p> <p><b>The Forum has been involved in the funding, design and implementation of a children's playground.</b></p> <p><b>Further, the Forum has and is continuing to make representations to the Local Council about what it considers to be infrastructure improvements including dangerous conditions for cyclists and pedestrians together with representations about planning matters.</b></p>

### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<b>The revisions to the Neighbourhood Plan are being prepared</b> <b>The installation of the playground is expected to be in 2024.</b>
Performance of fundraising activities against objectives set	Para 1.41	<b>Not Applicable as our funding comes from the local authority and other grant awarding bodies.</b>
Investment performance against objectives	Para 1.41	<b>Not Applicable</b>
Other		<b>Not Applicable</b>

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<b>The CIO has received grants totalling £20,000 and expended £8,637 on projects and £708 on administration costs.</b>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<b>Reserves are held specifically for projects and earmarked for those specific projects.</b>
Amount of reserves held	Para 1.22	<b>£49,785 which includes a small amount of working capital.</b>
Reasons for holding zero reserves	Para 1.22	<b>N/A</b>
Details of fund materially in deficit	Para 1.24	<b>N/A</b>
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<b>None as we are assured funding from the Local Council as Neighbourhood Forums are statutorily recognised bodies.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	<b>Primarily the Local Council although we do seek grants from other bodies such as the Lottery.</b>
Investment policy and objectives including any social investment policy adopted	Para 1.46	<b>All money that we receive is paid into an account in the name of the Broadstone Neighbourhood Forum CIO with Nat West Bank.</b>
A description of the principal risks facing the charity	Para 1.46	<b>We have prepared a Risk policy which we shall carefully follow.</b>  <b>The principal risk would be to commission work without the funds to pay for it but this is unlikely because of our source of funding as set out above where any project seeking funding needs to be preapproved.</b>
Other		

## Structure, Governance and Management

Description of charity's trusts:		<b>To run a neighbourhood forum</b>
Type of governing document (trust deed, royal charter)	Para 1.25	<b>A CIO constitution</b>
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	<b>A CIO</b>
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<b>With the exception of the Broadstone ward councillors who are automatically ex-officio trustees the trustees are elected for a term of 3 years maximum and selected for their skills, knowledge and experience</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<b>New trustees are given a copy of the constitution and the latest Trustees Annual Report and statement of accounts as well as Charity Commission information on running charities and being a trustee.</b>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	<b>As per our constitution.</b>
Relationship with any related parties	Para 1.51	<b>None other than with the Local Council.</b>
Other		

### Reference and Administrative details

Charity name	Broadstone Neighbourhood Forum CIO
Other name the charity uses	None
Registered charity number	1189350
Charity's principal address	100 Fairview Drive Broadstone Dorset BH18 9AR



## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N/A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
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#### Name of chief executive or names of senior staff members (Optional information)

--

## Exemptions from disclosure

Reason for non-disclosure of key personnel details

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## Other optional information

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## Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	<i>Jonathan Saunders</i>	
Full name(s)	Jonathan Russell Saunders	
Position (eg Secretary, Chair, etc)	Chair	
Date	14 January 2024	



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Bransford, New Street, Birmingham, B2 4JQ

Number  
1149359

## Receipts and payments accounts

CC16a

For the period from	01/04/2022	To	31/03/2023
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Grants	-	20,000	-	20,000	36,200
Advances from BCP	-	-	-	-	12,894
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	-	20,000	-	20,000	49,094
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total receipts</b>	-	20,000	-	20,000	49,094
<b>A3 Payments</b>					
Neighbourhood plan fees	-	-	-	-	2,200
Project costs	-	8,673	-	8,673	7,394
Office costs	480	673	-	1,153	480
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	480	9,346	-	9,826	10,074
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total payments</b>	480	9,346	-	9,826	10,074
<b>Net of receipts/(payments)</b>	- 480	10,654	-	10,174	39,020
<b>A5 Transfers between funds</b>	-	-	-	-	-
<b>A6 Cash funds last year end</b>	120	-	-	120	120
<b>Cash funds this year end</b>	360	10,654	-	10,294	39,140

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Natwest bank	4,802	44,993	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	<b>4,802</b>	<b>44,993</b>	-

(agree balances with receipts and payments account(s))

Agreement Error Unrestricted funds to nearest £	Agreement Error Restricted funds to nearest £	OK Endowment funds to nearest £

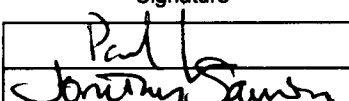
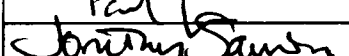
Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>	Accruals	10	-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	Paul Jessup	29/11/23
	Jonathan Saunders	26/11/23



**Section A**

**Independent Examiner's Report**

**Report to the trustees**

Broadstone Neighbourhood Forum CIO

**On accounts for the year  
ended**

31 March 2023

**Charity no  
(if any)**

1189350

**Set out on pages**

1 and 2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2023.

**Responsibilities and  
basis of report**

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent  
examiner's statement**

~~[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [ ] if not applicable.~~

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below \*) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

\* Please delete the words in the brackets if they do not apply.

**Signed:**

**Date:**

20/11/2023

**Name:**

Stephen William Evans

**Relevant professional  
qualification(s) or body**

ICAEW

(if any):

**Address:** 20 Harcourt Street  
London  
W1H 4HG

**Section B** **Disclosure**

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

**BROADSTONE NEIGHBOURHOOD FORUM CIO**

England & Wales - Charity number 1189350

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# Accounts

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## Trustees' Annual Report for the period

From 01 April 2021  
31 March 2022

Period start date To  
Period end date

Charity name: **BROADSTONE NEIGHBOURHOOD FORUM CIO**

Charity registration number: **1189350**

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<b>(1) To promote high standards of planning and architecture in and affecting Broadstone Poole Dorset (the area)</b> <b>(2) To educate the public in the geography history, natural history, culture and architecture of the Area</b> <b>(3) To secure the provision protection development and improvement of the features or areas of historic or public interest in the Area</b>
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.	Para 1.17 and 1.19	<b>The revision of the Broadstone Neighbourhood Plan.</b> <b>The consideration of local planning applications and making representations where appropriate,</b> <b>Considering ways to improve the neighbourhood of Broadstone</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>.No</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<b>Our policy is not to give any grants to individuals but to use our funds for projects that enhance Broadstone.</b>
Policy on social	Para 1.38	<b>Our policy is to improve the environment of Broadstone</b>

investment including program related investment		<b>thereby improving the area for residents and visitors of all types.</b>
Contribution made by volunteers	Para 1.38	<b>No financial contributions as all our funds to date have come from the Local Council but the Trustees have and are making a substantial contribution in time and expertise</b>
Other		<b>N/A</b>

## **Achievements and Performance**

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p><b>The Council's Local Plan is currently under review and the trustees have spent time seeking the views of local residents and reviewing the Councils proposals for the Neighbourhood plan.</b></p> <p><b>In addition, a community notice boards and new information boards have been erected together with information about walking and cycling routes for visitors.</b></p> <p><b>Further the Forum has and is continuing to make representations to the Local Council about what it considers to be infrastructure improvements including dangerous improvements for cyclists and pedestrians together with representations about planning matters.</b></p>

### **Additional information (optional)**

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<b>The revisions to the Neighbourhood Plan have been prepared New information boards have been completed and erected</b>
Performance of fundraising activities against objectives set	Para 1.41	<b>Not Applicable as our funding comes from the local authority</b>
Investment performance against objectives	Para 1.41	<b>Not Applicable</b>

Other		<b>Not Applicable</b>
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## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<b>The CIO has expended £10,974 and all the money has come from the Local Council so it is solvent.</b>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<b>Unfortunately at present the Local Council only passes money to the Forum pretty much when necessary and has been reluctant to deposit money which it receives from Community Infrastructure Levy [CIL] (which we are entitled to) until we actually need it. We are urgently seeking to resolve this.</b>
Amount of reserves held	Para 1.22	<b>None for the reasons set out above. We have a small amount of working capital.</b>
Reasons for holding zero reserves	Para 1.22	<b>See above</b>
Details of fund materially in deficit	Para 1.24	<b>N/A</b>
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<b>None as we are assured funding from the Local Council as Neighbourhood Forums are statutorily recognised bodies.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	<b>The Local Council at present although we may consider other sources including fund raising ourselves in the future.</b>
Investment policy and objectives including any social investment policy adopted	Para 1.46	<b>All money that we receive is paid into an account in the name of the Broadstone Neighbourhood Forum with Nat West Bank locally.</b>
A description of the principal risks facing the charity	Para 1.46	<b>At present we are preparing a Risk policy which we shall carefully follow.</b>  <b>The principal risk would be to commission work without the funds to pay for it but this is unlikely because of our source of funding as set out above where any project seeking funding needs to be preapproved.</b>
Other		

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## Structure, Governance and Management

Description of charity's trusts:		<b>To run a neighbourhood forum</b>
Type of governing document (trust deed, royal charter)	Para 1.25	<b>A CIO constitution</b>
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	<b>A CIO</b>
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<b>With the exception of the Broadstone ward councillors who are automatically ex-officio trustees the trustees are elected for a term of 3 years maximum and selected for their skills knowledge and experience</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<b>New trustees are given a copy of the constitution and the latest Trustees Annual Report and statement of accounts as well as Charity Commission information on running charities and being a trustee.</b>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	<b>As per our constitution.</b>
Relationship with any related parties	Para 1.51	<b>None other than with the Local Council.</b>
Other		

### Reference and Administrative details

Charity name	Broadstone Neighbourhood Forum CIO
Other name the charity uses	None
Registered charity number	1189350

Charity's principal address	100 Fairview Drive Broadstone Dorset BH18 9AR

**Names of the charity trustees who manage the charity**

	<b>Trustee name</b>	<b>Office (if any)</b>	<b>Dates acted if not for whole year</b>	<b>Name of person (or body) entitled to appoint trustee (if any)</b>
1	Jonathan Russell Saunders	Chair		
2	Michael Frederick Brooke	Vice Chair		
3	Carolyn Heather Eteen Bliss	Secretary		
4	Paul Jessop	Treasurer		
5	John Watson Crawford			
6	Christopher Mark Seamer Rathbone		15.6.20-31.3.21	
7	Geoffrey Albert Daulman		15.6.20-31.3.21	
8	Robert David White		15.6.20-31-3-21	
9	Vikki Slade		20.7.20-31.3.21	
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Corporate trustees - names of the directors at the date the report was approved

<b>Director name</b>		

Name of trustees holding title to property belonging to the charity

<b>Trustee name</b>	<b>Dates acted if not for</b>	



## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	<b>None</b>
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	<b>N/A</b>
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	<b>N/A</b>

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

#### Name of chief executive or names of senior staff members (Optional information)

--

### Exemptions from disclosure

Reason for non-disclosure of key personnel details

--

### Other optional information

--

## Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

Jonathan Saunders

Full name(s)

Jonathan Russell Saunders

Position (eg  
Secretary, Chair, etc)

Chair

Date

28 June 2022



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Broadstone Neighbourhood Forum CIO

No (if any)  
1189350

## Receipts and payments accounts

CC16a

For the period from	Period start date 01/04/2021	To	Period end date 31/03/222
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Grants	-	36,200	-	36,200	7,800
CLL advances from BCP	5,500	7,394	-	12,894	1,000
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>5,500</b>	<b>43,594</b>	<b>-</b>	<b>49,094</b>	<b>8,800</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>5,500</b>	<b>43,594</b>	<b>-</b>	<b>49,094</b>	<b>8,800</b>
<b>A3 Payments</b>					
Neighbourhood plan fees	-	2,200	-	2,200	7,800
Project costs	-	7,394	-	7,394	500
Office costs	480	-	-	480	416
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>480</b>	<b>9,594</b>	<b>-</b>	<b>10,074</b>	<b>8,716</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>480</b>	<b>9,594</b>	<b>-</b>	<b>10,074</b>	<b>8,716</b>
<b>Net of receipts/(payments)</b>	<b>5,020</b>	<b>34,000</b>	<b>-</b>	<b>39,020</b>	<b>84</b>
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	120	-	-	120	36
<b>Cash funds this year end</b>	<b>5,140</b>	<b>34,000</b>	<b>-</b>	<b>39,140</b>	<b>120</b>

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Natwest bank	5,140	34,000	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	<b>5,140</b>	<b>34,000</b>	<b>-</b>

(agree balances with receipts and payments account(s))

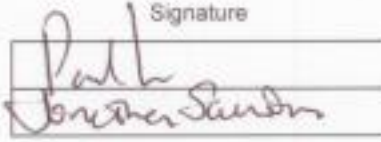
	Details	OR Unrestricted funds to nearest £	OR Restricted funds to nearest £	OR Endowment funds to nearest £
<b>B2 Other monetary assets</b>		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B4 Assets retained for the charity's own use</b>			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>	Accruals	10	-	
			-	
			-	
			-	
			-	

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

Signature 	Print Name Paul Jessup Jonathan Saunders	Date of approval 21/11/2022 21/11/2022
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**Section A**

**Independent Examiner's Report**

**Report to the trustees/  
members of**

Charity Name  
Broadstone Neighbourhood Forum CIO

**On accounts for the year  
ended**

31 March 2022

**Charity no  
(if any)**

1189350

**Set out on pages**

1 and 2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2022.

**Responsibilities and  
basis of report**

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent  
examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention (~~other than that disclosed below~~ \*) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

\* Please delete the words in the brackets if they do not apply.

**Signed:**

*S. Evans*

**Date:**

16.11.2022

**Name:**

Stephen Evans FCA

**Relevant professional  
qualification(s) or body  
(if any):**

Institute of Chartered Accounts in England and Wales

**Address:**

20 Harcourt Street

London

W1H 4HG

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

**Give here brief details of any items that the examiner wishes to disclose.**

**BROADSTONE NEIGHBOURHOOD FORUM CIO**

England & Wales - Charity number 1189350

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# Accounts

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## Trustees' Annual Report for the period

From 4 May 2020  
31 March 2021

Period start date To  
Period end date

Charity name: **BROADSTONE NEIGHBOURHOOD FORUM CIO**

Charity registration number: **1189350**

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<b>(1) To promote high standards of planning and architecture in and affecting Broadstone Poole Dorset (the area)</b> <b>(2) To educate the public in the geography history, natural history, culture and architecture of the Area</b> <b>(3) To secure the provision protection development and improvement of the features or areas of historic or public interest in the Area</b>
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.	Para 1.17 and 1.19	<b>The revision of the Broadstone Neighbourhood Plan.</b> <b>The consideration of local planning applications and making representations where appropriate,</b> <b>Considering ways to improve the neighbourhood of Broadstone</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>Yes. This was particularly considered on the creation of the CIO and is under review in regard to policy creation and actions.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<b>Our policy is not to give any grants to individuals but to use our funds for projects that enhance Broadstone.</b>
Policy on social	Para 1.38	<b>Our policy is to improve the environment of Broadstone</b>

investment including program related investment		<b>thereby improving the area for residents and visitors of all types.</b>
Contribution made by volunteers	Para 1.38	<b>No financial contributions as all our funds to date have come from the Local Council but the Trustees have and are making a substantial contribution in time and expertise</b>
Other		<b>N/A</b>

## **Achievements and Performance**

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p><b>The original local plan was prepared a few years ago by the Forum (before it was a CIO) and adopted by the then Local Council in 2018. Considerable time and effort has been spent in the last year in revising it and the revised version has been submitted to the new Local Council (Bournemouth Christchurch Poole) for comment and ultimately acceptance.</b></p> <p><b>In addition, a community notice boards and new information boards have been commissioned together with information about walking and cycling routes for visitors.</b></p> <p><b>Further the Forum has and is continuing to make representations to the Local Council about what it considers to be infrastructure improvements including dangerous improvements for cyclists and pedestrians together with representations about planning matters.</b></p>

### **Additional information (optional)**

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<b>The revisions to the Neighbourhood Plan have been prepared. New community notice board. New information boards commissioned</b>
Performance of		<b>Not Applicable as our funding comes from the local authority</b>

fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	<b>Not Applicable</b>
Other		<b>Not Applicable</b>

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<b>The CIO has expended less than 10K and all the money has come from the Local Council so it is solvent.</b>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<b>Unfortunately at present the Local Council only passes money to the Forum pretty much when necessary and has been reluctant to deposit money which it receives from Community Infrastructure Levy [CIL] (which we are entitled to) until we actually need it. We are urgently seeking to resolve this.</b>
Amount of reserves held	Para 1.22	<b>None for the reasons set out above. We have a small amount of working capital.</b>
Reasons for holding zero reserves	Para 1.22	<b>See above</b>
Details of fund materially in deficit	Para 1.24	<b>N/A</b>
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<b>None as we are assured funding from the Local Council as Neighbourhood Forums are statutorily recognised bodies.</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	<b>The Local Council at present although we may consider other sources including fund raising ourselves in the future.</b>
Investment policy and objectives including any social investment policy adopted	Para 1.46	<b>All money that we receive is paid into an account in the name of the Broadstone Neighbourhood Forum with Nat West Bank locally.</b>
A description of the principal risks facing the charity	Para 1.46	<b>At present we are preparing a Risk policy which we shall carefully follow.</b>  <b>The principal risk would be to commission work without the funds to pay for it but this is unlikely because of our source of funding as set out above where any project seeking funding needs to be preapproved.</b>
Other		

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## Structure, Governance and Management

Description of charity's trusts:		<b>To run a neighbourhood forum</b>
Type of governing document (trust deed, royal charter)	Para 1.25	<b>A CIO constitution</b>
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	<b>A CIO</b>
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<b>With the exception of the Broadstone ward councillors who are automatically ex-officio trustees the trustees are elected for a term of 3 years maximum and selected for their skills knowledge and experience</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	<b>New trustees are given a copy of the constitution and the latest Trustees Annual Report and statement of accounts as well as Charity Commission information on running charities and being a trustee.</b>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	<b>As per our constitution.</b>
Relationship with any related parties	Para 1.51	<b>None other than with the Local Council.</b>
Other		

### Reference and Administrative details

Charity name	Broadstone Neighbourhood Forum CIO
Other name the charity uses	None
Registered charity number	1189350

Charity's principal address	100 Fairview Drive Broadstone Dorset BH18 9AR

**Names of the charity trustees who manage the charity**

	<b>Trustee name</b>	<b>Office (if any)</b>	<b>Dates acted if not for whole year</b>	<b>Name of person (or body) entitled to appoint trustee (if any)</b>
1	Jonathan Russell Saunders	Chair		
2	Michael Frederick Brooke	Vice Chair		
3	Carolyn Heather Eteen Bliss	Secretary		
4	Paul Jessop	Treasurer		
5	John Watson Crawford			
6	Christopher Mark Seamer Rathbone		15.6.20-31.3.21	
7	Geoffrey Albert Daulman		15.6.20-31.3.21	
8	Robert David White		15.6.20-31-3-21	
9	Vikki Slade		20.7.20-31.3.21	
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

**Corporate trustees - names of the directors at the date the report was approved**

<b>Director name</b>		

**Name of trustees holding title to property belonging to the charity**

<b>Trustee name</b>	<b>Dates acted if not for whole year</b>	



## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	<b>None</b>
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	<b>N/A</b>
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	<b>N/A</b>

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

#### Name of chief executive or names of senior staff members (Optional information)

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### Exemptions from disclosure

Reason for non-disclosure of key personnel details

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### Other optional information

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## Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

Jonathan Saunders

Full name(s)

Jonathan Russell Saunders

Position (eg  
Secretary, Chair, etc)

Chair

Date

30<sup>th</sup> May 2021



CHARITY COMMISSION  
FOR ENGLAND AND WALES

Broadstone Neighbourhood Forum CIO

1189350

## Receipts and payments accounts

For the period from	5/4/2020	To	3/31/2021
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £
<b>A1 Receipts</b>				
Groundwork grant	7,800	-	-	7,800
BCP CIL advance	1,000	-	-	1,000
Sundry	83	-	-	83
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>8,883</b>	<b>-</b>	<b>-</b>	<b>8,883</b>
<b>A2 Asset and investment sales, (see table).</b>				
	-	-	-	-
	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>8,883</b>	<b>-</b>	<b>-</b>	<b>8,883</b>
<b>A3 Payments</b>				
Web hosting costs	79	-	-	79
Survey costs	384	-	-	384
Planning consultancy fees	7,800	-	-	7,800
Information board project costs	500	-	-	500
	-	-	-	-
	-	-	-	-
	-	-	-	-
	-	-	-	-
<b>Sub total</b>	<b>8,763</b>	<b>-</b>	<b>-</b>	<b>8,763</b>
<b>A4 Asset and investment purchases, (see table)</b>				
	-	-	-	-
	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>8,763</b>	<b>-</b>	<b>-</b>	<b>8,763</b>
<b>Net of receipts/(payments)</b>	<b>120</b>	<b>-</b>	<b>-</b>	<b>120</b>
A5 Transfers between funds	-	-	-	-
A6 Cash funds last year end	-	-	-	-
<b>Cash funds this year end</b>	<b>120</b>	<b>-</b>	<b>-</b>	<b>120</b>

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £
<b>B1 Cash funds</b>	Natwest bank current account	120	-
		-	-
		-	-
	<b>Total cash funds</b>	<b>120</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK

	Details	Unrestricted funds to nearest £	Restricted funds to nearest £
<b>B2 Other monetary assets</b>		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

	Details	Fund to which asset belongs	Cost (optional)
<b>B3 Investment assets</b>			-
			-
			-
			-
			-

	Details	Fund to which asset belongs	Cost (optional)
<b>B4 Assets retained for the charity's own use</b>			-
			-
			-
			-
			-
			-
			-
			-
			-

	Details	Fund to which liability relates	Amount due (optional)
<b>B5 Liabilities</b>			-
			-
			-
			-
			-

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

Signature	Print Name

**CC16a**



**Last year**  
**to the nearest £**

-
-
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-
-



**Endowment funds**  
to nearest £

-
-
-
-

OK

**Endowment funds**  
to nearest £

-
-
-
-
-
-

**Current value (optional)**

-
-
-
-
-

**Current value (optional)**

-
-
-
-
-
-
-
-
-

**When due (optional)**


Date of approval
