



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## 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**

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
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			
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

## 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

#### 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)		
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>	36	4,700	-	4,736	20,000
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total receipts</b>	36	4,700	-	4,736	20,000
<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>	1,211	25,058	-	26,269	9,346
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	-	-	-	-	-
<b>Total payments</b>	1,211	25,058	-	26,269	9,346
<b>Net of receipts/(payments)</b>	- 1,175	- 20,358	-	- 21,533	10,654
<b>A5 Transfers between funds</b>	-	-	-	-	-
<b>A6 Cash funds last year end</b>	4,802	44,993	-	49,795	39,141
<b>Cash funds this year end</b>	3,627	24,635	-	28,262	49,795



## 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
<b>B2 Other monetary assets</b>	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<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 asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
	Accruals	10	-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
	Paul Jessup	Paul Jessup	16-Dec-24	
	#UNKNOWN!	Jonathan Saunders	16-Dec-24	