



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## **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	<p><b>None as we are assured funding from the Local Council as Neighbourhood Forums are statutorily recognised bodies.</b></p> <p><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></p>

### 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	<p><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></p> <p><b>Any investment is directly into projects to improve the infrastructure and environment in our community.</b></p>
A description of the principal risks facing the charity	Para 1.46	<p><b>At present we are preparing a Risk policy which we shall carefully follow.</b></p> <p><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></p>

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 ( <a href="#">trust deed</a> , <a href="#">royal charter</a> )	Para 1.25	<b>A CIO constitution</b>
How is the charity constituted? (e.g <a href="#">unincorporated association</a> , 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



## 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	Paul Jessup
Position (eg Secretary, Chair, etc)	Chair	Treasurer
Date	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
<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	17-Nov-25	
	Jonathan Saunders	Jonathan Saunders	17-Nov-25	