

RESEARCH AND DEVELOPMENT FORUM

England & Wales · Charity number 1189876

Details

Status Registered

Legal form CIO

Registered 2020-06-10

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

Contact

Address 39 Mill Crescent
Hebburn
Tyne And Wear
NE31 1UG

Phone 07763242570

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Activities

Objects: THE OBJECTS OF THE CIO ARE:A. THE ADVANCEMENT OF EDUCATION AND LEARNING IN RESEARCH AND DEVELOPMENT FOR THE HEALTH AND SOCIAL CARE COMMUNITY IN ENGLAND, SCOTLAND, WALES AND NORTHERN IRELAND. THIS WILL HAVE PUBLIC BENEFIT IN IMPROVING THE QUALITY AND EFFECTIVENESS OF HEALTH AND SOCIAL CARE RESEARCH.

Activities: Education and training for R&D

Classification

- **How:** Provides Advocacy/advice/information
- **What:** Education/training

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-04-30	£50,000	£102,278	-	-
2024-04-30	£366,257	£2,336	-	-
2022-10-31	£70,000	£69	-	-
2021-10-31	£0	£0	-	-

Trustees

Name	Role	Appointed
Angela Topping	Chair	2023-01-03
Carolyn Rosemary Maloney		2023-07-17
Dipak Patel		2023-07-17
Dr Philippa Clare Brice		2024-06-01
Dr Rachel Elizabeth Gemine		2024-06-01
Dr Shona Agnes Haining PhD		2020-04-22
Margaret Elizabeth Cooper		2023-07-17
Mark William Apollo Brandon Grove		2024-06-01
Sean Paul Scott		2023-07-17
Shahista Hussain		2024-06-01

RESEARCH AND DEVELOPMENT FORUM

England & Wales - Charity number 1189876

Accounts



Trustees' Annual Report for the Period

From: 1 May 2024 to 30th April 2025

Charity Name: Research and Development Forum

Charity Registration Number: 1189876

Objectives and Activities:

	SORP reference	
Summary of the purposes of the charity as set out in its governing document.	Para 1.17	The advancement of education and learning in research and development for the health and social care community in England, Scotland, Wales, and Northern Ireland. This will have public benefit in improving the quality and effectiveness of health and social care research.
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	<p>The main activity carried out by the CIO is to provide financial support for members of the community to engage in education and learning, which is of benefit to UK health and social care research.</p> <p>Examples of financial support include: contributions to cover costs for community members to attend conferences; contributions to costs for trustees, working group chairs and/or co-chairs to represent the community on national working groups that influence policy with bodies including the Department of Health and Social Care (DHSC), the Health Research Authority (HRA), NHS England (NHSE) and the National Institute for Health and Care Research (NIHR); contributions to costs to facilitate partnering with other organisations and groups across the UK who support health and social care research; and providing funding to cover the essential infrastructure needed to facilitate these interactions.</p> <p>The trustees remain cautious in its approach in its awards. This is due to the ongoing changes in the UK health and social care research system, impacted by changes in national policy, systems and structures.</p> <p>The trustees are mindful of the inherent risks of such uncertainty, and this cautious approach is one way of mitigating such risk.</p>

<p>Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit.</p>	<p>Para 1.18</p>	<p>The trustees have regard to the guidance issued by the Charity Commission on public benefit.</p> <p>The CIO funded activities, governance and oversight support a UK-wide community that works together to improve the quality and effectiveness of UK health and social care research which has impact on people's lives.</p> <p>Equity, diversity, inclusion and belonging are at the forefront of all decision-making for the CIO, as involvement and engagement in UK health and social care research must not be exclusive.</p>
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Additional information (Optional):

You may choose to include further statements where relevant about:

	SORP reference	
<p>Policy on grant making.</p>	<p>Para 1.38</p>	<p>N/A</p>
<p>Policy on social investment including programme related investment.</p>	<p>Para 1.38</p>	<p>N/A</p>
<p>Contribution made by volunteers.</p>	<p>Para 1.38</p>	<p>Through the CIO, we have a number of peer-led working groups that provide peer support in topics such as research finance, contracting, data and AI and settings.</p> <p>These working groups are organic in that they are formed where there is an identified need to bring the community together around specific topics. Members of the working groups are recognised across the UK health and social care research system as experts in their field, often invited to be part of national consultations and projects.</p> <p>Working groups are chaired and co-chaired by volunteers from the R&D community. To recognise their generosity in giving up their time, sharing their expertise, promoting the work of the CIO and leading by example, they are offered either a funded place at the annual conference or a place on one of our training programmes.</p> <p>The volunteers add value and are highly valued by the CIO, and without their support, the CIO would not be where it is today.</p>
<p>Other.</p>		<p>N/A</p>

Achievements and Performance:

	SORP reference	
<p>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.</p>	<p>Para 1.20</p>	<p>Through the activities of RDF Professional Development Limited, the CIO's trading arm, we delivered the largest ever in-person conference to date as well as training opportunities across the UK health and social care research community.</p> <p>The annual conference held in Wales in May 2024 built on the success of the 2023 conference with over 850 delegates from across the UK health and social care research system. It also received record levels of abstracts, with the UK health and social care research community keen to share their work.</p> <p>We used the conference to announce 4 new trustees, who took up their roles in June 2024. This increased the number of trustees from 6 to 10.</p> <p>The collective skills, experience and knowledge of the trustees now cover the breadth and depth of health and social care research across the UK and is representative of the community it serves.</p> <p>The May 2024 conference was also the first one where we were able to offer funding to cover costs of attendance for those in volunteer roles. We also introduced a paid place for a new entrant to UK research and development to encourage attendance from under-represented groups. Both were well received and will also be made available for May 2025 conference.</p> <p>In the year, we offered 14 different training courses, covering 8 topic areas, delivered either in person or online. These courses attracted 267 registrations, and the feedback was very positive. As part of our commitment continuous improvement, the feedback is acted upon to ensure we are meeting the needs, through our training offer, of the community the CIO is there to support.</p> <p>We continue to buy in specialist administrative and co-ordination support for the CIO from the UK health and social care research system. This investment has been instrumental in developing our social media presence and building our HIVE Mind – a peer-led and supported network from across the UK with over 300 members</p>

		<p>which shares best practice, peer support and information in a supportive way. Its monthly online session regularly has over 50 attendees.</p> <p>The role has also been key in reaching out to underserved groups through improving our visibility across a number of platforms.</p> <p>Our working groups are regularly invited to be part of national policy reviews and updates, ensuring the voice of the community is at the table, has influence, and is being heard. For example, the Research Finance Working Group has been working with the Association of the British Pharmaceutical Industry (ABPI) to improve transparency and incentives for commercial research in the NHS, the Research Contracting Working Group has been involved in the Four Nations Research Contracting Group to develop new model contracts and agreements, and the Data and AI Working Group has been working with the Research Delivery Data Intelligence Programme (RDDI) to inform their work.</p>
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Additional Information (Optional):

You may choose to include further statements where relevant about:

Achievements against objectives set.	Para 1.41	N/A
Performance of fundraising activities against objectives set.	Para 1.41	N/A
Investment performance against objectives.	Para 1.41	N/A
Other.		N/A

Financial Review:

<p>Review of the charity's financial position at the end of the period.</p>	<p>Para 1.21</p>	<p>Following the transfer of a large contingency from the trading subsidiary, the success of the 2023 conference in the previous financial year, the increased business and engagement of the CIO volunteers in the current year, the movement in reserves was planned</p> <p>Financial sustainability is a priority for the trustees, and we are putting in place greater scrutiny of the direct and overhead costs of our trading activities, as any surplus from them is used to achieve our objectives.</p>
<p>Statement explaining the policy for holding reserves stating why they are held.</p>	<p>Para 1.22</p>	<p>Sustainability of the CIO and meeting the needs of the community is a high priority for the trustees. The UK health and social care research system is in a state of flux, and financial pressures in the system can impact on their ability to investment in its workforce through education and learning – our main source of income.</p> <p>To ensure the CIO is able to function, should there be a material reduction in our income, resulting from the funding challenges in and across the UK health and social care research system, reserves to cover 12 months operating costs will be held as a mitigation.</p>
<p>Amount of reserves held.</p>	<p>Para 1.22</p>	<p>£381,575</p>
<p>Reasons for holding zero reserves.</p>	<p>Para 1.22</p>	<p>N/A</p>
<p>Details of fund materially in deficit.</p>	<p>Para 1.24</p>	<p>N/A</p>
<p>Explanation of any uncertainties about the charity continuing as a going concern.</p>	<p>Para 1.23</p>	<p>Longevity for the CIO is a high priority, and part of planning for this is a prudent approach to financial management and maintaining a level of reserves that would allow the CIO to function without any new income for a period of 12 months.</p> <p>Training and conferences continue to be well attended, and through active monitoring and feedback loops, we respond to the needs of our community. We are also involved in national discussions with funders and policy makers to ensure we respond the needs of the wider UK health and social care research system, highlighting the CIO is self-sustaining and, that in the current environment, this is a</p>

		risk. Having such honest and transparent discussions is essential to our operations.
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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	Surplus from the annual conference and training activity.
Investment policy and objectives including any social investment policy adopted.	Para 1.46	N/A
A description of the principal risks facing the charity.	Para 1.46	The annual conference in May 2025 not generating forecast surplus and training planned during late 2025 and into 2026 may not realise funds anticipated.
Other.		N/A

Structure, Governance and Management:

Description of charity's trusts:		
Type of governing document.	Para 1.25	Research and Development Forum Constitution.
How is the charity constituted?	Para 1.25	Charitable Incorporated Organisation.
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	<p>For vacancies on the Board of Trustees, we have openly advertised, highlighting, where necessary, any specific skills, knowledge or experience that we feel is required. This is informed through the skills matrix we have, which is reviewed on an annual basis.</p> <p>The Constitution allows up to 12 trustees, and at the end of this reporting period, we have 10 in post. We will be ensuring, as is good practice, to have a staggered approach to replacement, thus ensuring continuity on the Board.</p> <p>As we become more mature, more representative of the community we serve and more future-focussed, we will become more targeted in our recruitment of trustees.</p> <p>All trustees are part of the recruitment and selection process for any additional or replacement trustees.</p>

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	<p>New trustees will be directed to the:</p> <ul style="list-style-type: none"> Charity Commission's 'Roles and Responsibilities of trustees' guidance Constitution. Trustees annual report and financial statements Previous minutes of the trustee meetings <p>New trustees will be given:</p> <ul style="list-style-type: none"> Full access to dedicated shared platform for CIO business (Future NHS) Ongoing peer support from current trustees
The charity's organisational structure and any wider network with which the charity works.	Para 1.51	<p>The CIO has a Board of 10 trustees from across the UK, with 1 of the trustees acting as Chair. The Board is supported by a part-time co-ordinator.</p> <p>The Board meets monthly, online, and has a clear agenda, from which minutes and actions are taken and progressed.</p>

		<p>The Board operates under a Compact, informed by the Nolan Principles, setting the expected behaviours of how the trustees and co-ordinator will work together, as well as with key stakeholders.</p> <p>Every quarter, the Board meets online with the Chairs and Co-Chairs of the working groups to ensure there is good communication flows between and across them all groups.</p> <p>The culture is one where every voice matters, and these voices inform decisions made.</p> <p>The CIO does not directly employ any staff - it buys in services needed to allow it to run, both at an operational and strategic level.</p>
Relationship with any related parties.	Para 1.51	<p>The CIO has a trading subsidiary – RDF Professional Development Limited, through which it offers conferences, symposia, and training and development opportunities to the UK health and social care research community. An annual charitable donation is made from the trading subsidiary to the CIO to enable it to achieve its charitable objects.</p> <p>The trading subsidiary is supported via a virtual office for its activities and the relationship and has its own, separate, Board of Directors.</p>
Other.		N/A

Reference and Administrative Details:

Charity name:	Research and Development Forum
Other name the charity uses:	N/A
Registered charity number:	1189876
Charity's principal address:	39 Mill Crescent Hebburn Tyne and Wear NE31 1UG

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)
Angela Topping	Chair		
Carolyn Maloney			
Dipak Patel	Treasurer	From March 2025	
Margaret Cooper	Treasurer	To February 2025	
Mark Brandon-Grove		From June 2024	
Philippa Brice		From June 2024	
Rachel Gemine		From June 2024	
Sean Scott			
Shahista Hussain			
Shona Haining			

Corporate Trustees – Names of the Directors at the Date the Report Was Approved:

Director name	Dates acted if not for whole year
N/A	

Name of Trustees Holding Title to Property Belonging to The Charity:

Trustee name	Dates acted if not for whole year
N/A	

Funds Held as Custodian Trustees on Behalf of Others:

Description of the assets held in this capacity.	N/A
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
N/A		

Name of chief executive or names of senior staff members (optional information):

N/A

Exemptions From Disclosure:

Reason for non-disclosure of key personnel details:

N/A

Other Optional Information:

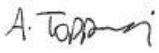
N/A

Declarations:

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

Signed on behalf of the charity trustees:

Signature(s):

	
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Full name(s):

Angela Topping	
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Position:

Chair	
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Date:

10.02.2026	
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CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name Research and Development Forum	No (if any)
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Receipts and payments accounts

CC16a

For the period from	Period start date 1-May-24	To	Period end date 30-Apr-25
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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 £
A1 Receipts					
Transfer of funds from trading activities	50,000	-	-	50,000	366,257
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	50,000	-	-	50,000	366,257
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	50,000	-	-	50,000	366,257
A3 Payments					
Expenses	3,701	-	-	3,701	2,143
External Services - Co-ordination	41,965	-	-	41,965	193
External Services - Oversight	13,000	-	-	13,000	-
Grant Funding - RDF24 Contribution	14,454	-	-	14,454	-
Grant Funding - RDF25 Contribution	29,154	-	-	29,154	-
Postage	4	-	-	4	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	102,278	-	-	102,278	2,336
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	102,278	-	-	102,278	2,336
Net of receipts/(payments)	- 52,278	-	-	- 52,278	363,921
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	433,852	-	-	433,852	69,931
Cash funds this year end	381,574	-	-	381,574	433,852

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

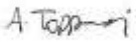
Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds		381,574	-	-
		-	-	-
		-	-	-
	Total cash funds	381,574	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

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

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

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval
		Angela Topping	10/02/2026



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
Research and Development Forum

**On accounts for the year
ended**

2024/25

**Charity no
(if any)**

1189876

Set out on pages

(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 30/04/2024.

**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:

Date:

12th February 2026

Name:

Averil Armstrong

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

Fellow Chartered Management Accountant (FCMA)

Address:

5 Dene Terrace West
Wylam
Northumberland
NE41 8AZ



RESEARCH AND DEVELOPMENT FORUM

England & Wales - Charity number 1189876

Accounts



Trustees' Annual Report for the period

From: 1 November 2022 to 30th April 2024

Charity Name: Research and Development Forum

Charity Registration Number: 1189876

Objectives and activities:

	SORP reference	
Summary of the purposes of the charity as set out in its governing document.	Para 1.17	The advancement of education and learning in research and development for professionals and the public in the health and social care community in England, Scotland, Wales and Northern Ireland. This will have public benefit in improving the quality and effectiveness of health and social care research.
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	With ongoing recovery from the COVID-19 pandemic, budget pressures in the health and care system and onboarding of new trustees, we have been cautious in our approach to planned events and expenditure throughout the reporting period. Plans are in early stage of development as to how to invest our funding to maximise our charitable objects, whilst still being sensitive to our environment.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit.	Para 1.18	The trustees have regard to the guidance issued by the Charity Commission on public benefit. Planned activities will help to improve the quality of health and care research and the involvement of patients, service users and the public in research, and this is at the forefront of our decision making as a board of trustees.

Additional information (optional):

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making.	Para 1.38	N/A
Policy on social investment including program related investment.	Para 1.38	N/A
Contribution made by volunteers.	Para 1.38	N/A
Other.		N/A

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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>We have been cautious in our approach throughout the reporting period in relation to planned events and training opportunities. The annual conference is our biggest event and the 2023 conference was our most successful to date reaching over 800 delegates from across the UK health and care system.</p> <p>For the May 2024 conference, and for the first time, we have been able to offer CIO paid places to the working group chairs (volunteer roles). We have also introduced a paid for place for a new entrant to UK research and development to encourage attendance from under-represented groups.</p> <p>We are buying in specialist administrative and co-ordination support for the CIO from the health and care system. This is an annual provision of services agreement charged to the CIO.</p> <p>We are reviewing our training offer for the community to ensure it meets their needs.</p> <p>We increased the number of trustees to 6 in the reporting period, mitigating risk and increasing depth and breadth of knowledge of the community the charity is there to serve. We have in place a compact and skills matrix for the trustees and will be increasing the number of trustees in the next reporting period.</p>

Additional information (optional):

You may choose to include further statements where relevant about:

Achievements against objectives set.	Para 1.41	N/A
Performance of fundraising activities against objectives set.	Para 1.41	<p>Fundraising will normally be from the surplus realised from providing relevant events. We have maximised this in the reporting period, transferring a high contingency from the trading arm due to the success of the 2023 conference.</p> <p>We have increased our expertise in financial management and oversight with the appointment of new trustees.</p>
Investment performance against objectives.	Para 1.41	N/A

Other.		N/A

Financial review:

Review of the charity's financial position at the end of the period.	Para 1.21	We have transferred a large contingency that had been held in the trading arm in the reporting period. This is the result of the success of the 2023 conference. Plans are in early stage of development as to how to invest our funding to maximise our charitable objects.
Statement explaining the policy for holding reserves stating why they are held.	Para 1.22	We will hold a reasonable level of reserve to cover unexpected/substantial disruption to activities. This was tested during the COVID-19 pandemic, and work is already underway to determine what is reasonable as part of our planning.
Amount of reserves held.	Para 1.22	£433,852
Reasons for holding zero reserves.	Para 1.22	N/A
Details of fund materially in deficit.	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern.	Para 1.23	Training and conferences continue to be well attended and we respond to the needs of the UK research and development community. We are also involved in national discussions with funders and policy makers to ensure we respond the needs of the wider system. This is part of our strategy to ensure the charity operates as a going concern.

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	Surplus from training events, symposia, workshops, and an annual conference.
Investment policy and objectives including any social investment policy adopted.	Para 1.46	N/A
A description of the principal risks facing the charity.	Para 1.46	Events planned during late 2024 and into 2025 may not realise funds anticipated.
Other.		N/A

Structure, governance and management:

Description of charity's trusts:		
Type of governing document.	Para 1.25	Research and Development Forum Constitution.
How is the charity constituted?	Para 1.25	Charitable Incorporated Organisation.
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	<p>Open advertisement to the community to increase number of trustees to 6 in the first instance. The constitution allows up to 12 trustees and we plan to increase the number of trustees over time. This will be done in a staggered way to ensure continuity on the board and will become more targeted as we critically evaluate the skills needed to take the charity forward.</p> <p>All trustees were part of the recruitment and selection process for the new trustees, and also agreed the new Chair, who took on the role in October 2023.</p>

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	<p>New trustees will be directed to the:</p> <ul style="list-style-type: none"> • Charity Commission's 'Roles and Responsibilities of trustees' guidance • Constitution. • Trustees annual report and financial statements. • Minutes of the trustee meetings. • Have access to dedicated SharePoint for charity business. We will be moving to Future NHS in the coming year as has increased functionality and accessibility.
The charity's organisational structure and any wider network with which the charity works.	Para 1.51	N/A
Relationship with any related parties.	Para 1.51	N/A
Other.		

Reference and administrative details:

Charity name:	Research and Development Forum
Other name the charity uses:	
Registered charity number:	1189876

Charity's principal address:

39 Mill Crescent
Hebburn
Tyne and Wear
NE31 1UG

Funds held as custodian trustees on behalf of others:

Description of the assets held in this capacity.	N/A
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):

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 trustees:

Signature(s):

	
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Full name(s):

Angela Topping	
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Position:

Chair	
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Date:

2 nd December 2024	
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CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name Research and Development Forum	No (if any)
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CC16a

Receipts and payments accounts

For the period from	Period start date 01.Nov.22	To	Period end date 30.Apr.24
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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 £
A1 Receipts					
Transfer of funds from trading activities	366,257	-	-	366,257	70,000
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	366,257	-	-	366,257	70,000
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	366,257	-	-	366,257	70,000
A3 Payments					
Expenses	2,143	-	-	2,143	69
External Services	193	-	-	193	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	2,336	-	-	2,336	69
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	2,336	-	-	2,336	69
Net of receipts/(payments)	363,921	-	-	363,921	69,931
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	363,921	-	-	363,921	69,931

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 £
B1 Cash funds		433,852	-	-
		-	-	-
		-	-	-
	Total cash funds	433,852	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK


Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

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

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

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	Angela Topping	02.12.2024



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name
Research and Development Forum

**On accounts for the year
ended**

2023/24

**Charity no
(if any)**

1189876

Set out on pages

(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 30/04/2024.

**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:

Date:

3rd December 2024

Name:

Averil Armstrong

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

Fellow Chartered Management Accountant (FCMA)

Address:

5 Dene Terrace West
Wylam
Northumberland
NE41 8AZ



RESEARCH AND DEVELOPMENT FORUM

England & Wales - Charity number 1189876

Accounts



Trustees' Annual Report for the period

From **1 November 2021 to 31 October 2022**

Charity name: **Research and Development Forum**

Charity registration number: **1189876**

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	Providing education and learning in research and development for professionals and the public in the health and social care community in England, Scotland, Wales, and Northern Ireland. This will have public benefit in improving the quality and effectiveness of health and social care research.
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	Due to the pandemic planned activities were suspended as organised events were either not permitted or unlikely to be attended by health and social care professionals or the public.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have regard to the guidance issued by the Charity Commission on public benefit. Planned activities will help to improve the quality of health and care research and the involvement of patients, service users and the public in research.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	N/A
Policy on social investment including program related investment	Para 1.38	N/A
Contribution made by volunteers	Para 1.38	N/A

Other		N/A

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	A scaled back events and ongoing engagement with health and social care research staff took place during the period covered by this report. The charity was unable to proceed with plans due to the ongoing pandemic.

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	N/A
Performance of fundraising activities against objectives set	Para 1.41	Fundraising will normally be from the surplus realised from providing relevant events. This has not been possible during the Covid19 pandemic.
Investment performance against objectives	Para 1.41	N/A
Other		N/A

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	An award was provided to support the Charity to cover potential financial risks during the pandemic and is held as a reserve.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	As a new Charity there had not been an opportunity to build reserves before the pandemic hit. In the future the intention is to hold reserves to cover unexpected/substantial disruption to activities.
Amount of reserves held	Para 1.22	£69,931
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	Training and other relevant events have been well attended in the past and the events planned for 2022 and into 2023 means income will start to flow through in Q4 2022/Q1 2023.

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	Training events, Symposia, Workshops, and an annual conference planned to restart in Q4 2022/Q1 2023.
Investment policy and objectives including any social investment policy adopted	Para 1.46	N/A
A description of the principal risks facing the charity	Para 1.46	Events planned during late 2022 and into 2023 may not realise funds anticipated.
Other		N/A

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Research and Development Forum Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	It is intended to increase the number of Trustees when disruption due to Covid19 reduces. Members of the community will be invited to express interest. Initially current Trustees will seek to identify potential Trustees to provide a Board with a broad range of skills and expertise.

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	New Trustees will be directed to the: <ul style="list-style-type: none"> • Charity Commission's 'Roles and Responsibilities of Trustees' guidance • Constitution • Trustees Annual Report and Financial Statements • Minutes of the Trustees meetings
The charity's organisational structure and any wider network with which the charity works	Para 1.51	N/A
Relationship with any related parties	Para 1.51	N/A
Other		

Reference and Administrative details

Charity name	Research and Development Forum
Other name the charity uses	
Registered charity number	1189876
Charity's principal address	22 The Crescent Ponteland Newcastle upon Tyne NE20 9AL

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	Maria Palmer	Chair		
2	Shona Haining	Secretary		
3	Nicola Williams	Treasurer		
4	Angela Topping			
5				
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7				
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13				
14				
15				
16				
17				
18				
19				
20				

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

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/A
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)

--

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)

	
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Full name(s)

Nicola Williams

Position (eg Secretary,
Chair, etc)

Treasurer

Date

17 July 2023



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name Research and Development Forum	No (if any) 1189876
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CC16a

Receipts and payments accounts

For the period from	Period start date 1-Nov-21	To	Period end date 31-Oct-22
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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 £
A1 Receipts					
PA Consulting award	70,000	-	-	70,000	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	70,000	-	-	70,000	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	70,000	-	-	70,000	-
A3 Payments					
Card fees	69	-	-	69	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	69	-	-	69	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	69	-	-	69	-
Net of receipts/(payments)	69,931	-	-	69,931	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	69,931	-	-	69,931	-

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 £
B1 Cash funds		69,931	-	-
		-	-	-
		-	-	-
	Total cash funds	69,931	-	-
	(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 £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

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

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

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	Nicola Williams	7/17/2023



Independent examiner's report on the accounts

Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name

Research and Development Forum

On accounts for the year ended

2022

Charity no (if any)

1189876

Set out on pages

(remember to include the page numbers of additional sheets)

Responsibilities and basis of report

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31 / 09 / 2022**.

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:

Date:

7th August 2023

Name:

Helen Hodgson

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

Address:

21 Rhodfar Morwydd, Penarth, CF64 2UD

Section B

Disclosure

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.

N/A

RESEARCH AND DEVELOPMENT FORUM

England & Wales - Charity number 1189876

Accounts



Trustees' Annual Report for the period

From 10/6/20 To 31/10/21

Charity name: Research and Development Forum

Charity registration number: 1189876

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	Providing education and learning in research and development for professionals and the public in the health and social care community in England, Scotland, Wales and Northern Ireland. This will have public benefit in improving the quality and effectiveness of health and social care research.
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	Due to the pandemic planned activities were suspended as organised events were either not permitted or unlikely to be attended by health and social care professionals or the public.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees have regard to the guidance issued by the Charity Commission on public benefit. Planned activities will help to improve the quality of health and care research and its management and the involvement of patients, service users and the public in research.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	N/A
Policy on social investment including program related investment	Para 1.38	N/A
Contribution made by volunteers	Para 1.38	N/A

Other		

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	During the period covered by this report The charity was unable to proceed with plans due to the pandemic.

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	N/A
Performance of fundraising activities against objectives set	Para 1.41	Fundraising will normally be from the surplus realised from providing relevant events. This has not been possible during the Covid pandemic.
Investment performance against objectives	Para 1.41	N/A
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The Charity held no funds during the period covered by this report.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	N/A
Amount of reserves held	Para 1.22	N/A
Reasons for holding zero reserves	Para 1.22	The Charity will not incur costs prior to income derived from event surpluses.
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	Training events and other relevant events have been well attended in the past and enquiries about restarting events post-covid indicate that income will start to flow through in Q4 2022/Q1 2023.

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	Training events, Symposia, Workshops and an annual conference planned to restart in Q4 2022/Q1 2023.
Investment policy and objectives including any social investment policy adopted	Para 1.46	N/A
A description of the principal risks facing the charity	Para 1.46	Covid 19 continues to pose a level of risk due to potential restrictions on holding events and reduced attendances because of reluctance to attend face-to-face events resulting in lower than expected income.
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Research and Development Forum Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	<p>It is intended to increase the number of Trustees when disruption due to Covid 19 reduce.</p> <p>Membership of the community will be invited to express interest. Initially current Trustees will seek to identify potential Trustees to provide a Board with a broad range of skills and expertise.</p>

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	<p>New Trustees will be directed to the Charity Commission's 'Roles and Responsibilities of Trustees' guidance and the;</p> <ul style="list-style-type: none"> • Constitution • Trustees Annual Report and Financial Statements • Minutes of the Trustees meetings <p>New Trustees will be allocated a mentor from the existing Trustees</p>
The charity's organisational structure and any wider network with which the charity works	Para 1.51	N/A
Relationship with any related parties	Para 1.51	N/A
Other		

Reference and Administrative details

Charity name	Research and Development Forum
Other name the charity uses	
Registered charity number	1189876

Charity's principal address	

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	Maria Palmer	Chair		
2	Shona Haining	Secretary		
3	Nicola Williams	Treasurer		
4	Virginia Minogue	Governance Lead	10/06/2020 – 01/07/21	
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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

Director name		
N/A		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
N/A		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/A
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
-----------------	------	---------

N/A		

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

N/A

Exemptions from disclosure

Reason for non-disclosure of key personnel details

N/A

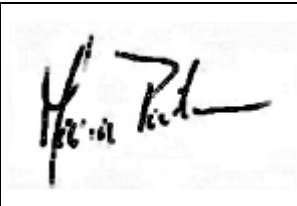
Other optional information

N/A

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)	Dr Maria Palmer	
Position (eg Secretary, Chair, etc)	Chair	
Date	31/08/2022	