



## Trustees' Annual Report for the Period

From: 1 May 2024 to 30<sup>th</sup> 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>

Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit.	Para 1.18	<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	
Policy on grant making.	Para 1.38	N/A
Policy on social investment including programme related investment.	Para 1.38	N/A
Contribution made by volunteers.	Para 1.38	<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&amp;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>
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	<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:

Review of the charity's financial position at the end of the period.	Para 1.21	<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>
Statement explaining the policy for holding reserves stating why they are held.	Para 1.22	<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>
Amount of reserves held.	Para 1.22	£381,575
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	<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"> <li>Charity Commission's 'Roles and Responsibilities of trustees' guidance</li> <li>Constitution.</li> <li>Trustees annual report and financial statements</li> <li>Previous minutes of the trustee meetings</li> </ul> <p>New trustees will be given:</p> <ul style="list-style-type: none"> <li>Full access to dedicated shared platform for CIO business (Future NHS)</li> <li>Ongoing peer support from current trustees</li> </ul>
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
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**Exemptions From Disclosure:**

Reason for non-disclosure of key personnel details:

N/A
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**Other Optional Information:**

N/A
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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:

10.02.2026	
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CHARITY COMMISSION  
FOR ENGLAND AND WALES

Charity Name  
Research and Development Forum

No (if any)

## Receipts and payments accounts

CC16a

For the period  
from

Period start date  
1-May-24

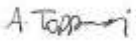
To

Period end date  
30-Apr-25

### 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>					
Transfer of funds from trading activities	50,000	-	-	50,000	366,257
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>50,000</b>	<b>-</b>	<b>-</b>	<b>50,000</b>	<b>366,257</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>50,000</b>	<b>-</b>	<b>-</b>	<b>50,000</b>	<b>366,257</b>
<b>A3 Payments</b>					
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	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>102,278</b>	<b>-</b>	<b>-</b>	<b>102,278</b>	<b>2,336</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>102,278</b>	<b>-</b>	<b>-</b>	<b>102,278</b>	<b>2,336</b>
<b>Net of receipts/(payments)</b>	<b>- 52,278</b>	<b>-</b>	<b>-</b>	<b>- 52,278</b>	<b>363,921</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>433,852</b>	<b>-</b>	<b>-</b>	<b>433,852</b>	<b>69,931</b>
<b>Cash funds this year end</b>	<b>381,574</b>	<b>-</b>	<b>-</b>	<b>381,574</b>	<b>433,852</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>		381,574	-	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	<b>381,574</b>	<b>-</b>	<b>-</b>
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>	Details			
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<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)
			-	
			-	
			-	
			-	
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

