

THE CHARITY EXCELLENCE FRAMEWORK

England & Wales · Charity number 1195568

Details

Status Registered

Legal form CIO

Registered 2021-08-19

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

Contact

Address 14 Blackmore Gate
Buckland
Aylesbury
Buckinghamshire
HP22 5JT

Phone 07595371444

Email ian@charityexcellence.co.uk

Website www.charityexcellence.co.uk

Activities

Objects: THE OBJECT OF THE CIO IS TO PROMOTE THE EFFICIENCY AND EFFECTIVENESS OF CHARITIES, PRIMARILY THROUGH THE PROVISION OF SERVICES AND TRAINING, WITH A FOCUS ON THE USE OF TECHNOLOGY AND WITH DELIVERY THROUGH AN ONLINE PLATFORM OR DATA-SETS, DIRECTLY OR THROUGH PARTNER ORGANISATIONS. NOTHING IN THIS CONSTITUTION SHALL AUTHORISE AN APPLICATION OF THE PROPERTY OF THE CIO FOR THE PURPOSES WHICH ARE NOT CHARITABLE IN ACCORDANCE WITH [SECTION 7 OF THE CHARITIES AND TRUSTEE INVESTMENT(SCOTLAND) ACT 2005] AND [SECTION 2 OF THE CHARITIES ACT (NORTHERN IRELAND) 2008]

Activities: We provide a digital and AI eco system, which is a free, simple to use one-stop-shop that enables any UK non profit to find the funding, and free help and resources it needs. We also have the Charity Sector Data Store with circa 1 million data points and our Charity Excellence Learning website of free online AI courses. We prioritise support for small charities and marginalised groups.

Classification

- **How:** Provides Services, Acts As An Umbrella Or Resource Body
- **What:** General Charitable Purposes
- **Who:** Other Charities Or Voluntary Bodies, The General Public/mankind

Geography

- Northern Ireland
- Scotland
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-10-31	£66,745	£54,775	-	-
2024-10-31	£42,088	£34,710	-	-
2023-10-31	£62,717	£12,430	-	-
2022-10-31	£18,367	£18,367	-	-

Trustees

Name	Role	Appointed
Amit Bansal		2025-06-02
EDWARD MAYO		2025-08-04
SARAH SWAYSLAND		2021-04-08

THE CHARITY EXCELLENCE FRAMEWORK

England & Wales - Charity number 1195568

Accounts

Charity Commission Annual Return 2025

THE CHARITY EXCELLENCE FRAMEWORK

Charity registration number: 1195568

Most of the information you give in this form will become publicly available on the Register of Charities. Any field that the Charity Commission will not display will be clearly marked.

This document is a record of the information provided in the Annual Return 2024.

Financial period

Financial period start date**Financial period end date**

Income and spending

Income £**Spending £**

Number of contracts from government

How many contracts (other than grant agreements) did your charity receive from central government or a local authority during the financial period for this return?

0

Number of grants from government

How many grants did your charity receive from central government or a local authority during the financial period for this return?

0

Income breakdown

Donations and legacies (excluding Endowments Received)

£44,342

Charitable activities

£0

Other trading activities

£0

Investments

£0

Other

£22,403

Recipients of grants

Please round all figures to the nearest pound (do not enter decimal points or commas).Individuals

£0

Other charities

£0

Other organisations that are not charities

£0

Trustee payments

Excluding out of pocket expenses, for what were any of the trustees paid during the financial period for this return?

e. None of the trustees have been paid

Did any of the trustees resign and take up employment with your charity in the financial period of this return?

No

Income from outside the UK

Did your charity receive income from outside of the United Kingdom in the financial period of this return?

No

Delivering activities outside the United Kingdom

Did your charity deliver charitable activities outside of the United Kingdom in the financial period of this return?

No

Spending outside of the United Kingdom

Did your charity spend funds outside of the United Kingdom in the financial period of this return?

No

Select countries/territories your charity operated in during the financial period covered by this annual return

United States

£ 0

Please record total spend in each country. Round figures to the nearest £100if possible (do not enter decimal points or commas). We recommend you select "Save" regularly to avoid losing any values entered.

£ 0

Methods of money transfer

How much money did your charity send in total outside of the United Kingdom using a method other than the regulated banking system in the financial period for this return?

£0

Trading subsidiaries

Does the charity have any trading subsidiaries?

No

Charity contact details correct

Is the contact address displayed from the Register of Charities, correct?

Yes

Charity headquarters details correct

Is this the same address that you use as your charity's administrative headquarters?

Yes

Charity contact address

14 BLACKMORE GATE

BUCKLAND

AYLESBURY

Buckinghamshire

HP22 5JT

Charity Headquarters address

14 BLACKMORE GATE

BUCKLAND

AYLESBURY

Buckinghamshire

HP22 5JT

Membership type

Is your charity part of a wider group structure with a parent body and subsidiary bodies?

no, the charity is not part of a wider group structure

Employment contract types

People were permanently employed by your charity

0

People were on fixed-terms contracts with your charity

0

Self-employed people were working for your charity

0

Governance policies

Internal charity financial controls policy and procedures

No

Safeguarding policy and procedures

Yes

Financial reserves policy and procedures

No

Complaints policy and procedures

Yes

Serious incident reporting policy and procedures

No

Internal risk management policy and procedures

No

Trustee expenses policy and procedures

No

Trustee conflicts of interest policy and procedures

Yes

Investing charity funds policy and procedures

Not applicable

Campaigns and political activity policy and procedures

Not applicable

Bullying and harassment policy and procedures

Yes

Social media policy and procedures

Yes

Engaging external speakers at charity events policy and procedures

Yes

Serious Incidents

Has your charity reported all Serious Incidents (including any historical incidents) that the charity became aware of during the financial period of this return?

There were no incidents to report

External risk and impact

Donations,

Unknown/No Change/Not Applicable

Other income - grants

Unknown/No Change/Not Applicable

Other income - contracts

Positive

Other income - investment

Unknown/No Change/Not Applicable

Expenditure on charitable activities

Negative

Expenditure on overheads

Unknown/No Change/Not Applicable

Number of volunteers

Unknown/No Change/Not Applicable

Number of employees

Unknown/No Change/Not Applicable

Number of trustees

Unknown/No Change/Not Applicable

Fundraising activities

Unknown/No Change/Not Applicable

Capacity to deliver services

Negative

Total service demand

Negative

Volunteers

Excluding trustees, provide an estimate of the number of volunteers who carried out charitable activities on behalf of your charity in the United Kingdom during the financial period of this return?

2

Privacy statement

Any information you give us will be held securely and processed only in accordance with the rule on data protection. We will not disclose your personal details to anyone unconnected to the Charity Commission unless:

- you have consented to their release; or
- we are legally obliged to disclose them; or
- we regard disclosure as either (a) necessary so that we can properly carry out our statutory functions or (b) necessary in the public interest.

We may share and disclose information about you with relevant public authorities, regulatory bodies and agencies, outside the Charity Commission but only if:

- we can lawfully do so; and
- we decide that disclosure is necessary for national security, crime detection, prevention, and law enforcement, or other issues in the public interest

Information we collect about you

We will use this information:

To enable us to carry out our statutory functions and duties;

This will include the following actions:

- (a) update, consolidate, and improve the accuracy of our records;
- (b) undertake crime detection and prevention and law enforcement and assist the third parties specified above to investigate or prevent crime and carry out law enforcement;

(c) data analysis, testing, research, statistical and survey purposes

Information we receive from other sources.

Information we receive from other sources

We may combine this information with information you give to us and information we collect about you.

We may use this information and the combined information for the purposes set out above (depending on the types of information we receive).

We will ensure that any such disclosure and use is proportionate; considers your right to respect for your private life; and is done fairly and lawfully in accordance with the data protection principles of the Data Protection Act.

The Data Protection Act 1998 regulates the use of 'personal data', which is essentially any information, however stored, about identifiable living individuals.

As a 'data controller' under the Act, the Charity Commission must comply with it. Any changes we may make to our privacy statement in the future will be set out in the replacement version of this form.

Please check back frequently to see any updates or changes to our privacy policy.

Declaration

Your role at the charity (select one):

Other

Given names	ian
Family name	McLintock
Telephone number	07595371444
Email	ian@charityexcellence.co.uk
Date submitted	23/05/2026

It is a criminal offence under section 60 of the Charities Act 2011 for anyone to knowingly or recklessly provide false or misleading information to the commission; this includes suppressing, concealing or destroying documents.

THE CHARITY EXCELLENCE FRAMEWORK
Annual Report and Financial Statements
Year ended 31 October 2025

Registered Charity 1195568

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Administrative details

Name of charity	The Charity Excellence Framework
Registered charity number	1195568
Trustees	Mr Christopher Shawdon Ms Sarah Swaysland Mr Amit Bansal (Appointed on 02 June 2025) Mr Edward Mayo (Appointed on 04 August 2025) Ms Marie Davies (Resigned on 03 March 2025)
Registered office	14 Blackmore Gate Buckland Bucks HP22 5JT
Bankers	CAF Bank

Trustees Annual Report for the year ended 31 October 2025

Scope & Purpose

This is the annual report of the Board of Trustees of Charity Excellence Framework (“CEF”) for the financial year starting 01 November 2024 and ending 31 October 2025 (2024/25). Charity Excellence is a comprehensive on-line platform that enables UK charities and non-profit organizations to find the funding, resources, help and data they need to deliver services to their beneficiaries and to improve their governance and financial stewardship.

Governance & Trustee Board

Charity Excellence is a registered charity governed by a board of independent trustees who collectively bring senior charity and commercial sector expertise and professional skills in technology, finance, marketing and fund raising. At the year end, there were four trustees:

- Christopher Shawdon
- Sarah Swaysland
- Amit Bansal
- Edward Mayo

Trustees
Charity Excellence Framework

**Independent Examiner's Report to the Trustees
for the year ended 31 October 2025**

I report to the Trustees on my examination of the accounts of the charitable company for the year ended 31 October 2025.

Responsibilities and basis of report

The charity Trustees, who are also Directors for the purposes of company law, are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

Independent examiners statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act: or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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

Accountants For Charities

Signed *Amit Bansal*

Statement of Financial Activities (Including Summary of Income & Expenditure Account)
Year Ended 31 October 2025

		Unrestricted Funds	Restricted Funds	Total Funds	Prior Year Funds
		£	£	£	£
Income from:					
Donations	3	44,342	-	44,341	25,299
Other	3	22,403	-	22,403	16,789
		66,745	-	66,744	42,088
Expenditures on:					
Charitable Activities	4	54,775	-	34,321	34,710
		54,775	-	34,321	34,710
Net Income / (Expenditure)		11,970	-	11,970	7,378
Reconciliation of Funds:					
Total Funds Brought Forward		68,086	-	68,086	60,708
Total Funds Carried Forward	6	80,056	-	80,056	68,086

Balance Sheet
As at 31 October 2025

		31-Oct 2025	31-Oct 2024
		£	£
Cash at Bank		87,603	74,007
Other Current Assets		24,720	0
Current Liabilities & Accruals	5	32,266	5,921
Total Net Assets		<u>80,056</u>	<u>68,086</u>
Unrestricted Funds	6	<u>80,056</u>	<u>68,086</u>
		<u>80,056</u>	<u>68,086</u>

The trustees acknowledge their responsibilities for complying with the requirements of the Charity Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to Charities

The accounts were approved by the Trustees on 15 May 2026 and signed on their behalf by:


 Signed

Notes to the financial statements

1. Basis of Preparation

These financial statements have been prepared under the historical cost convention, with assets and liabilities recognised at cost or transaction value unless otherwise stated in the relevant notes.

The accounts have been prepared in accordance with the following:

- the Statement of Recommended Practice: *Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102)*, issued on 16 July 2014 (the Charities SORP);
- the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (*FRS 102*); and
- the Charities Act 2011.

The Trustees have assessed the charity's financial position and consider that there are no material uncertainties relating to events or conditions that may cast significant doubt on the charity's ability to continue as a going concern.

No material prior period errors have been identified during the reporting period.

2. Accounting policies

Income

Income is included in the Statement of Financial Activities when the charity becomes entitled to the resources, it is more likely than not that the trustees will receive the resources and the monetary value can be measured with sufficient reliability. Performance related grants are recognised to the extent that the charity has provided the specified goods or services.

It is not practical to value the monetary value of donated time.

Expenditure and liabilities

Liabilities are recognised where it is more likely than not that there is a legal or constructive obligation committing the charity to pay out resources and the amount of the obligation can be measured with reasonable certainty.

3. Income Resources

	Incoming Resources
Unrestricted funds;	£
Donations	44,342
Other income	22,403
Total Income	66,745

4. Expenditures

	Unrestricted £
Accountancy	4,460
Corporate Consultancy	-
Independent Examiner	-
Insurance	183
IT and Software	22,907
Advertising & Marketing	2,453
Professional (Alumna Ltd)	24,000
Sundries	268
Travel & Subsistence	504
Total Expenses	54,775

5. Current Liabilities: Creditors falling due within one year

	2025 £	2024 £
Other Creditors & Accruals	32,266	5,921
	<u>32,266</u>	<u>5,921</u>

6. Net Movement in Funds

	Balance at Start £	Income £	Outgoings £	Balance as at 31 October 2025
Unrestricted Funds	68,086	66,745	(54,775)	80,056
	<u>68,086</u>	<u>66,745</u>	<u>(54,775)</u>	<u>80,056</u>

- The charity has no employees and, therefore, no employee earning in excess of £30,000 per annum.
- None of the trustees have been paid any remuneration or received any other benefits from employment with this charity or a related entity.
- No trustee expenses have been incurred.

7. Related Party Transactions

Mr. Amit Bansal was appointed as a trustee of the charity on 2 June 2025. He is a qualified chartered accountant and is also a trustee and founder of Accountants for Charities. In the interest of full transparency, CEF has entered into an arrangement with Accountants for Charities for the preparation and filing of its financial statements for the year ended 31 October 2025. A fee of £1,000 has been agreed for these services. The Trustees confirm that this arrangement was made on an arm's length basis and in the best interests of the charity.

**Independent Examiner's Report to the Trustees
for the year ended 31 October 2025**

I report to the Trustees on my examination of the accounts of the charitable company for the year ended 31 October 2025.

Responsibilities and basis of report

The charity Trustees, who are also Directors for the purposes of company law, are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

Independent examiners statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act: or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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

Accountants For Charities

Signed *Amit Bansal*

THE CHARITY EXCELLENCE FRAMEWORK

England & Wales - Charity number 1195568

Accounts

THE CHARITY EXCELLENCE FRAMEWORK
Annual Report and Financial Statements
Year ended 31 October 2024

Registered Charity 1195568

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Administrative details

Name of charity The Charity Excellence Framework

Registered charity number 1195568

Trustees
Mr Jonathan Badger (**Resigned on 02 Aug 2024**)
Mr Christopher Shawdon (**Chair- Appointed on 02 Aug 2024**)
Mrs Josephine Mann (**Resigned on 04 Aug 2025**)
Ms Marie Davies (**Resigned on 03 March 2025**)
Ms Sarah Swaysland
Mr Edward Mayo (**Appointed on 04 Aug 2025**)
Mr Amit Bansal (**Appointed on 02 June 2025**)

Registered office
14 Blackmore Gate
Buckland
Bucks HP22 5JT

Bankers Barclays Bank

Trustees Annual Report for the year ended 31 October 2024

Scope & Purpose

This is the annual report of the Board of Trustees of Charity Excellence Framework (“Charity Excellence”, CEF) for the financial year starting 1st November 2023 and ending 31st October 2024 (2023/24). Charity Excellence is a comprehensive on-line platform that enables UK charities and non-profit organisations to find the funding, resources, help and data they need to deliver services to their beneficiaries and to improve their governance and financial stewardship.

Website traffic on the Charity Excellence platform increased during the year, with 650,000 visits to the platform during the year compared to 520,000 visits during the previous year. Numbers of new users also increased, with an average of 3,000 new members registering in each month of the year. Total membership of Charity Excellence at the end of the year (new members who registered in the year plus active members who registered in previous years) was approximately 50,000. This size and rate of growth makes Charity excellence the largest and fastest growing UK charity community. Together, the charity members of Charity Excellence support more than 10 million charity beneficiaries.

In recent years, Charity Excellence has positioned itself as a leader in the application of Artificial Intelligence (AI) in the charity sector. Our platform uses AI in innovative ways, and our organisation provides training to charities in the use of AI to improve their operations and to save precious resources.

Towards the end of the year, Charity Excellence applied to the Charity Commission to extend its Primary Purpose with the view to expanding its footprint and services, and the scope for income generation. Notification of the outcome is expected in 2024/25.

Governance & Trustee Board

Charity Excellence is a registered charity governed by a board of independent trustees who collectively bring senior charity and commercial sector expertise and professional skills in technology, finance, marketing and fund raising. At the year end, there were four trustees:

- Maries Davies
- Josephine Mann
- Christopher Shawdon
- Sarah Swaysland

The previous chair of trustees, Jonathan Badger, stood down during the year for family reasons. Jonathan was a founding trustee of Charity Excellence and worked very hard to support it in its early days. The Board and chief executive wish to record their gratitude to him for the leadership and support he provided whilst a trustee and chair of trustees.

Marie Davies has been experiencing poor health and, although she remains a trustee, she has stood back from active work with us and has given notice that she wishes to resign in 2024/25. The Board and chief executive wish to thank her for her work to date. The Board is in the process of identifying another trustee to take her place. It is also seeking to appoint a new chair of trustees.

Funding & Resources

In the year, Charity Excellence was provided with funding from the GSR Foundation and Lloyds Bank, pro-bono support from Biomni and Redbrain, smaller donations and revenue from advertisers in its newsletter. Its role as a leader in the use of AI by charities, enabled Charity Excellence to attract extra funding support in 2023/24.

Income is used to remunerate the founder/chief executive (working as a contractor) and to pay for development resources to work alongside him. The development priority in 2023/24 was to standardise the software, in order to move on from the bespoke nature of the original system that was created in 2018. The upgraded system can deal with higher volumes of traffic while, at the same time, facilitating a reduction in the costs of upgrades and maintenance, and better business continuity.

The trustees wish to thank our funders and our providers of pro bono support which have enabled Charity Excellence to continue to provide its platform free of charge to members. The trustees also wish to thank the chief executive for the long hours worked and unerring focus on the needs of Charity Excellence members.

Charity Excellence enters the Financial Year 2024/25 needing to move from the uncertainty of ad hoc financial support to a position of stable funding. This would offer the degree of certainty needed to continue to operate the platform free of charge, to continue to develop the system, to provide additional services and to continue to remunerate the chief executive. The trustees provide support when they can, free of charge. The aim is to achieve sustainable funding so that Charity Excellence can employ resource to support the chief executive and reduce the long hours he works.

The trustees are working to improve the transparency of the financial position of the charity. This includes a change in the provider of banking services, better use of accounting software, and greater separation of the activities of the charity from the chief executive's other work.

The trustees are grateful to MJ Golz & Co Ltd for preparation of the annual accounts of the charity. The accounts have also been subject to independent examination.

Major Achievements 2023/24

The past year has been a period of significant achievement:

- Appreciable net growth in the use of the system with 10,000 new users in the year. This was coupled with an increase in financial support from various sources, including new sources of support.
- Useful expansion of the range of charity policy templates available on the platform, including policies on the use and risk of AI.
- Free training in use of AI for all members, mainly via webinars. This included introductory training for trustees to enable them to work with their charities to make better use of AI.
- Enhancements and updates to the Help Finder directory.
- Two informative annual surveys: a survey in May 2024 of progress and issues in the sector; and a survey in October 2024 of trustee opinions.
- Development of a funding strategy and preparation for a funding initiative in 2024/25.

Charity Excellence continues to earn praise and accolades and was a Finalist in the Charity Partnership category of the 2024 Charity Awards.

Future Plans

Plans for 2024/25 include:

- Action to formalise our funding offerings in order to obtain a more stable funding stream, by attracting a range of donors. This includes approaching potential donors who could provide a guaranteed stream of funding and the stability it would provide. Funding could be used to support one or two part time posts that could take pressure away from the Chief Executive and help to run the charity.
- Plans to provide a “Donate Button” to encourage one-off donations from satisfied users.
- A drive to increase retention of users. Although the platform attracts many new users, continuity of use is not as high as it could be. The new standardised software should facilitate development of more attractive web pages and easier searching for information, which should encourage users to stay.
- Encouraging greater utilisation of whole platform. To date the main destination of users is Funding Finder when greater help could be obtained if they also visited the Help Finder facility.
- Provision of a programme of further training in the use of AI, building on the work in 2023. Training includes use of AI for writing a web page, preparing a grant application and drafting minutes of meetings. A sponsor is being sought for the programme.
- Enhancement of the Health Check facility on the platform to include checks for AI readiness, for example AI governance and action to avoid scams and fakes
- Providing the Charity Commission agrees to the extension of the Primary Purpose of the charity, other means of growing income would be available

Trustees
Charity Excellence Framework

Trustee 1



Christopher Shawdon (Aug 18, 2025, 3:33pm)

Name: Christopher Shawdon



Trustee 2

Sarah Swaysland (Aug 18, 2025, 3:41pm)

Name: Sarah Swaysland

**Independent Examiner's Report to the Trustees
For the year ended 31 October 2024**

I report to the Trustees on my examination of the accounts of the charitable company for the year ended 31 October 2024.

Responsibilities and basis of report

The charity Trustees, who are also Directors for the purposes of company law, are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

Independent examiners statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act: or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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

Haroon Ashfaq

Approved on
Haroon Ashfaq (Aug 19, 2025, 1:51pm)

Statement of Financial Activities (Including Summary of Income & Expenditure Account)
Year Ended 31 October 2024

		Unrestricted Funds	Restricted Funds	Total Funds	Prior Year Funds
		£	£	£	£
Income from:					
Donations	3	25,299	-	25,299	63,267
Other	3	16,789	-	16,789	6,622
		42,088	-	42,088	69,889
Expenditures on:					
Charitable Activities	4	34,710	-	34,710	13,567
		34,710	-	34,710	13,567
Net Income / (Expenditure)		7,378	-	7,378	56,322
Reconciliation of Funds:					
Total Funds Brought Forward		60,708	-	4,386	4,386
Total Funds Carried Forward	6	68,086	-	11,764	60,708


Balance Sheet
As at 31 October 2024

		31-Oct 2024	31-Oct 2023
		£	£
Cash at Bank		74,007	64,308
Current Liabilities & Accruals	5	5,921	3,600
Total Net Assets		<u>68,086</u>	<u>60,708</u>
Unrestricted Funds	6	68,086	60,708
		<u>68,086</u>	<u>60,708</u>

The trustees acknowledge their responsibilities for complying with the requirements of the Charity Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to Charities

The accounts were approved by the Trustees on 4 Aug 2025 and signed on their behalf by:-



Trustee 1 _____
Christopher Shawdon (Aug 18, 2025, 9:53 pm)

Christopher Shawdon



Trustee 2 _____
Sarah Swaysland (Aug 18, 2025, 9:49 pm)

Sarah Swaysland

Notes to the financial statements

1 Basis of preparation

These accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant note to these accounts.

The accounts have been prepared in accordance with:

- the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 (the Charities SORP); and
- the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102);
- The Charities Act 2011.

The Trustees consider that there are no material uncertainties related to events or conditions that cast significant doubt on the charity's ability to continue as a going concern.

No material prior year error has been identified in the reporting period.

2 Accounting policies

Income

Income is included in the Statement of Financial Activities when the charity becomes entitled to the resources, it is more likely than not that the trustees will receive the resources and the monetary value can be measured with sufficient reliability. Performance related grants are recognised to the extent that the charity has provided the specified goods or services.

It is not practical to value the monetary value of donated time.

Expenditure and liabilities

Liabilities are recognised where it is more likely than not that there is a legal or constructive obligation committing the charity to pay out resources and the amount of the obligation can be measured with reasonable certainty.

3 Income Resources

	Incoming Resources
	£
Unrestricted funds;	
Lloyds Bank Foundation	5,000
The GSR Foundation	20,000
Other Donations	299
Advertisement Income	16,789
Total Income	42,088

4 Expenditures

	Unrestricted £
Accountancy	660
Corporate Consultancy	1,600
Independent Examiner	300
Insurance	172
IT and Software	17,127
Marketing	417
Professional (Alumna Ltd)	14,000
Sundries	296
Travel & Subsistence	139
Total Expenses	34,710

5 Current Liabilities: Creditors falling due within one year

	2024	2023
	£	£
Other Creditors & Accruals	5,921	3,600
	<u>5,921</u>	<u>3,600</u>

6 Net Movement in Funds	Balance at Start	Income	Outgoings	Balance as at 31 October 2024
	£	£	£	
Unrestricted Funds	60,708	42,088	-34,710	68,086
	<u>60,708</u>	<u>42,088</u>	<u>-34,710</u>	<u>68,086</u>

- The charity has no employees and, therefore, no employee earning in excess of £30,000 per annum.
 - None of the trustees have been paid any remuneration or received any other benefits from employment with this charity or a related entity.
 - No trustee expenses have been incurred.



Issuer MJG Accountants

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Parties involved with this document

Document processed	Party + Fingerprint
Mon, 18th Aug 2025 15:33:37 BST	Christopher Shawdon - Signer (3ee32cae65a70d42d70c6804da65bd15)
Mon, 18th Aug 2025 15:41:06 BST	Sarah Swaysland - Signer (05746e5553006e44aaabc826f738a040)

Audit history log

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Parties involved with this document

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THE CHARITY EXCELLENCE FRAMEWORK

England & Wales - Charity number 1195568

Accounts

THE CHARITY EXCELLENCE FRAMEWORK
Annual Report and Financial Statements
Year ended 31 October 2023

Registered Charity 1195568

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Administrative details

Name of charity The Charity Excellence Framework

Registered charity number 1195568

Trustees
Mr Jonathan Badger (Chair)
Mrs Josephine Mann
Ms Marie Davies
Ms Sarah Swaysland

Registered office
14 Blackmore Gate
Buckland
Bucks HP22 5JT

Bankers Barclays Bank

Trustees Report for the year ended 31 October 2023

Aims & Activities

The charity provides a comprehensive on-line platform that enables UK charities and not-for-profit organisations to find the funding, resources, help and data they need to deliver services to their beneficiaries and to improve their governance and financial stewardship

Scope & Purpose

At the year end, Charity Excellence had 40,000 members, growing at a rate of over 2,000 a month, making it the largest and fastest growing UK charity community. Over the year, monthly website traffic grew from 35,000 to 52,000. Together, the charity members of Charity Excellence support more than 10 million beneficiaries.

In 2022/23, Charity Excellence began to position itself as a leader in the application of Artificial Intelligence (AI) in the charity sector. In previous years, Charity Excellence has provided comprehensive support for charities in response to the Cost-of-Living crisis and tools to address the funding deficit during the Covid-19 and post-Covid-19 years. It continues to respond to changes in policy and to issues and developments in the charity sector.

Governance & Trustee Board

We are a registered charity governed by a board of independent trustees who collectively bring significant senior charity and commercial sector expertise and from various professional disciplines. At the year end, we had four trustees:

- [Jonathan Badger](#) (Chair)
- [Josephine Mann](#)
- [Marie Davies](#)
- [Sarah Swaysland](#)

A fifth trustee, Dries de Coster, stood down during the year. The Board and Chief Executive wish to record their gratitude to him for the outstanding support he provided whilst a trustee.

Funding & Resources

In the year, we were provided with pro-bono support by [Biomni](#) and [Liquid Palladium](#), donations from [Redbrain](#) and the [GSR Foundation](#), funding from our commercial partner [Access UK](#) and several other donations. Income is used to remunerate our founder/chief executive with a modest salary, and to pay for development resources to work alongside him. We wish to thank all our funding organisations which have enabled us to continue to provide our platform free of charge to members. And we want to thank our Chief Executive for the long hours worked and unerring focus on the needs of Charity Excellence members.

We enter Financial Year 2023/24 with a higher level of guaranteed funding than in previous years, offering the stability needed to operate the platform and providing the basis for building our existing income streams and bringing new funding onboard.

Reserves

Charity held the bank reserves of £64,308 at the end of the period, 31 October 2023. The Trustees consider that there are no material uncertainties about the charity's ability to continue as a going concern.

Major Achievements 2022/23

The past year has been a period of significant achievements:

- **"AI Bunnies" and AI Tools:** Launched on Christmas Day 2022, our new Artificial Intelligence (AI) enquiry facility - AI Bunnies - can manage up to 120 queries a minute and takes users to significant parts of the knowledge banks that are not fully utilised. In March 2023 we launched an AI tool for bid writing and in June 2023 we introduced a ChatGPT interface. We expect to continue to develop AI tools during the next two years, including an AI concierge service. Our plan to be a sector leader in the use of AI in the charity sector is delivering significant benefits to charities.
- **Charity Sector Data Store:** The framework's Charity Data Store grew throughout the year. By October 2023, the system's lifetime scored questionnaires total was 18,677, providing a significant store of data with an estimated number of data points of 485,000.
- **Sector-Wide Funding Cuts:** In September 2023, we produced a report on the reduction in funding to the charity sector using, information from the Charity Sector Data Store (see above) and survey data.

Future Plans

Our plans for system development in 2023/24 include:

- **Widespread AI Adoption:** The harnessing of AI in the charity sector is at the centre of our plans for the future. We will continue to develop and roll out AI tools, providing access to our own AI services, allowing others to deliver e-services, and potentially spinning off or co-creating with others.
- **UK Wide Charity Data Network:** We are currently building a far more powerful principal dashboard for deployment in 2024. This will enable us to exploit the master data set far more effectively, and will also give principal systems to large charities, grant makers, groups of charities and more.
- **AI Concierge Service:** We plan gradually to bring other providers into the system, using AI to grow our reach and to migrate our remaining systems to AI to create our AI Concierge Service. This will help to create a single gateway to the sector for anyone wanting to use charity services.

Trustees
Charity Excellence Framework

Trustee 1 J Mann
Name: Josephine Mann

Trustee 2 S Swaysland
Name: Sarah Swaysland

**Independent Examiner's Report to the Trustees
For the year ended 31 October 2023**

I report to the Trustees on my examination of the accounts of the charitable company for the year ended 31 October 2023.

Responsibilities and basis of report

The charity Trustees, who are also Directors for the purposes of company law, are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

Independent examiners statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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

Approved on: 19-02-2025



Haroon Ashfaq, FCCA

Statement of Financial Activities (Including Summary of Income & Expenditure Account)
Year Ended 31 October 2023

		Unrestricted Funds	Restricted Funds	Total Funds	Prior Year Funds
		£	£	£	£
Income from:					
Donations	3	63,267	-	63,267	18,665
Other	3	6,622	-	6,622	2,587
		<u>69,889</u>	<u>-</u>	<u>69,889</u>	<u>21,252</u>
Expenditures on:					
Raising Funds	4	-	-	-	-
Charitable Activities	4	13,567	-	13,567	16,866
Others	4	-	-	-	-
		<u>13,567</u>	<u>-</u>	<u>13,567</u>	<u>16,866</u>
Net Income / (Expenditure)		56,322	-	56,322	4,386
Reconciliation of Funds:					
Total Funds Brought Forward		4,386	-	4,386	-
Total Funds Carried Forward	6	<u>60,708</u>	<u>-</u>	<u>60,708</u>	<u>4,386</u>

Balance Sheet
As at 31 October 2023

		31-Oct 2023	31-Oct 2022
		£	£
Cash at Bank		64,308	4,386
Current Liabilities & Accruals	5	3,600	-
Total Net Assets		60,708	4,386
Restricted Funds	6	-	-
Unrestricted Funds	6	60,708	4,386
		60,708	4,386

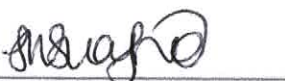
The charity was entitled to exemption from audit under Charities Act 2011 and trustees have not required the charity to obtain an audit in accordance with Charities Act 2011.

The trustees acknowledge their responsibilities for complying with the requirements of the Charity Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to Charities.

The accounts were approved by the Trustees on 27 March 2025 and signed on their behalf by:-

Trustee 1 

Trustee 2 

Notes to the financial statements

1 Basis of preparation

These accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant note to these accounts.

The accounts have been prepared in accordance with:

- the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 (the Charities SORP); and
- the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102);
- The Charities Act 2011.

The Trustees consider that there are no material uncertainties related to events or conditions that cast significant doubt on the charity's ability to continue as a going concern.

No material prior year error has been identified in the reporting period.

2 Accounting policies

Income

Income is included in the Statement of Financial Activities when the charity becomes entitled to the resources, it is more likely than not that the trustees will receive the resources and the monetary value can be measured with sufficient reliability. Performance related grants are recognised to the extent that the charity has provided the specified goods or services.

It is not practical to value the monetary value of donated time.

Expenditure and liabilities

Liabilities are recognised where it is more likely than not that there is a legal or constructive obligation committing the charity to pay out resources and the amount of the obligation can be measured with reasonable certainty.

3 Income Resources

	Incoming Resources
	£
Unrestricted funds;	
Charities Trust	30,000
The GSR Foundation	25,000
Other Donations	8,267
Advertisement Income	6,622
	<hr/>
	69,889
	<hr/>
Restricted Funds	-
	<hr/>
Total Funds	69,889

4 Expenditures

	Unrestricted	Restricted
	£	£
Charitable Activities;		
IT and Software	7,967	-
Independent Examiner	600	-
Accountancy (2022 & 2023)	3,000	-
Professional (Alumna Ltd)	2,000	-
	<hr/>	<hr/>
	13,567	-
	<hr/>	<hr/>

5 Current Liabilities: Creditors falling due within one year

	2023	2022
	£	£
Loan & Overdraft	-	-
Other Creditors & accruals	3,600	-
	<hr/>	<hr/>
	3,600	-
	<hr/>	<hr/>

6	Net Movement in Funds	Balance at Start	Income	Outgoings	Balance as at 31 Oct 2023
		£	£	£	
	Unrestricted Funds	4,386	69,889	(13,567)	60,708
	Restricted Funds	-	-	-	-
		4,386	69,889	(13,567)	60,708

- The charity has no employees and, therefore, no employee earning in excess of £30,000 per annum.
 - None of the trustees have been paid any remuneration or received any other benefits from employment with this charity or a related entity.
 - No trustee expenses have been incurred.
-

THE CHARITY EXCELLENCE FRAMEWORK

England & Wales - Charity number 1195568

Accounts

THE CHARITY EXCELLENCE FRAMEWORK
Annual Report and Financial Statements
Year ended 31 October 2022

Registered Charity 1195568

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Administrative details

Name of charity	The Charity Excellence Framework
Registered charity number	1195568
Trustees	Mr Jonathan Badger (Chair) Mrs Josephine Mann Ms Marie Davies Ms Sarah Swaysland
Registered office	14 Blackmore Gate Buckland Bucks HP22 5JT
Bankers	Barclays Bank

Trustees Report for the year ended 31 October 2022

Aims & Activities

The charity's services focus on marginalised groups, including BAME, LGBTQI+, and disability communities, as well as food banks, homelessness, and women's organisations.

As a free one-stop shop, it helps UK non-profits access funding, resources, and data using cutting-edge technology, including AI. Its big data store enables it to develop crisis support, and we led the fight during the 2020 COVID-19 pandemic and the current Cost-of-Living crisis, launching the only comprehensive support program for front-line charities.

Reserves

Charity held the reserves of £4,386 at the end of the period, 31 October 2022.

The Trustees consider that there are no material uncertainties about the charity's ability to continue as a going concern.

Statement of Trustees' responsibilities

The Trustees are responsible for preparing the Trustees' annual report and the financial statements in accordance with applicable law with the requirements of the Charities Act 2011

In preparing these financial statements, the Trustees are required to:

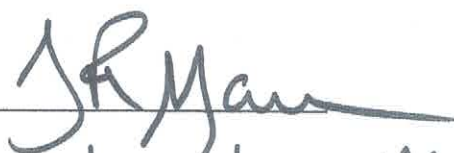
- Select suitable accounting policies and then apply them consistently
- Observe the methods and principles in the Charities SORP
- Make judgements and estimates that are reasonable and prudent
- State whether applicable UK Charity Standards and statements of recommended practice have been followed, subject to any material departures disclosed and explained in the financial statements
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation

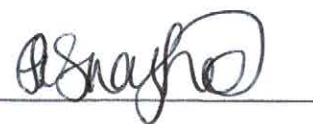
The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the applicable Charity standards. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

Preparation of the report

The report was approved and authorised for issue by the Trustees on _____ (Date) and is signed on behalf of the Trustees by: -

Trustee 1 
Name: Josephine Mann

Trustee 2 
Name: Sarah Snayland

Statement of Financial Activities (Including Summary of Income & Expenditure account)
Year Ended 31 October 2022

		Unrestricted Funds	Restricted Funds	Total Funds
		£	£	£
Income from:				
Donations	3	18,665	-	18,665
Charitable Activities	3	-	-	-
Other	3	2,587	-	2,587
		<u>21,252</u>	<u>-</u>	<u>21,252</u>
Expenditures on:				
Raising Funds	4	-	-	-
Charitable Activities	4	16,866	-	16,866
Others	4	-	-	-
		<u>16,866</u>	<u>-</u>	<u>16,866</u>
Net Income / (Expenditure)		4,386	-	4,386
Reconciliation of Funds:				
Total Funds Brought Forward		-	-	-
Total Funds Carried Forward	6	<u>4,386</u>	<u>-</u>	<u>4,386</u>


Balance Sheet
As at 31 October 2022

		31-Oct 2022 £
Cash at Bank		4,386
Current Liabilities	5	-
Total Net Assets		<u>4,386</u>
Restricted Funds	6	-
Unrestricted Funds	6	<u>4,386</u>
		<u>4,386</u>

The trustees acknowledge their responsibilities for complying with the requirements of the Charity Act with respect to accounting records and the preparation of accounts.

These accounts have been prepared in accordance with the provisions applicable to Charities

The accounts were approved by the Trustees on...../..... /2024 and signed on their behalf by:-

Trustee 1 

Trustee 2 

Notes to the financial statements

1 Basis of preparation

These accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant note to these accounts.

The accounts have been prepared in accordance with:

- the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 (the Charities SORP); and
- the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102);
- The Charities Act 2011.

The Trustees consider that there are no material uncertainties related to events or conditions that cast significant doubt on the charity's ability to continue as a going concern.

No material prior year error has been identified in the reporting period.

2 Accounting policies

Income

Income is included in the Statement of Financial Activities when the charity becomes entitled to the resources, it is more likely than not that the trustees will receive the resources and the monetary value can be measured with sufficient reliability. Performance related grants are recognised to the extent that the charity has provided the specified goods or services.

It is not practical to value the monetary value of donated time.

Expenditure and liabilities

Liabilities are recognised where it is more likely than not that there is a legal or constructive obligation committing the charity to pay out resources and the amount of the obligation can be measured with reasonable certainty.

3 Income Resources

Unrestricted funds;

Donations	18,665
Advertisement Income	2,587
Earned Income (Charitable Activities)	-
	<u>21,252</u>
Restricted Funds	-
Total Funds	<u>21,252</u>

4 Expenditures

	Unrestricted £	Restricted £
Charitable Activities;		
IT and Software	16,866	-

5 Current Liabilities: Creditors falling due within one year

	2022 £
Loan & Overdraft	-
Other Creditors	-
	<u>-</u>

6 Net Movement in Funds	Balance at Start £	Income £	Outgoings £	Balance as at 31 Oct 2022
Unrestricted Funds	-	21,252	(16,866)	4,386
Restricted Funds	-	-	-	-
	-	21,252	(16,866)	4,386

- The charity has no employees and, therefore, no employee earning in excess of £30,000 per annum.
 - None of the trustees have been paid any remuneration or received any other benefits from employment with this charity or a related entity.
 - No trustee expenses have been incurred.