

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

01/11/2024

Financial period end date

31/10/2025

Income and spending

Income £

£66,745

Spending £

£54,775

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		80,056	68,086
Unrestricted Funds	6	80,056	68,086
		80,056	68,086

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
	32,266	5,921

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
	68,086	66,745	(54,775)	80,056

- 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.

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Accountants For Charities

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