

THE BELL SURGERY CHARITABLE TRUST

England & Wales · Charity number 1200727

Details

Status Registered

Legal form CIO

Registered 2022-10-18

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

Contact

Address The Bell Surgery
York Road
Henley-On-Thames
RG9 2DR

Phone 01491843256

Activities

Objects: THE OBJECT OF THE CIO IS TO RELIEVE SICKNESS AND PROMOTE AND PROTECT GOOD HEALTH OF THE PATIENTS AT THE BELL SURGERY, HENLEY-ON-THAMES BY PROVISION OF FUNDS TO PURCHASE EQUIPMENT AND SERVICES WHICH ARE NOT PROVIDED BY THE NHS AND OTHER SUPPORT TO PATIENTS INCLUDING INFORMAL HEALTH WORKSHOPS.

Activities: The objective of the Trust is to relieve sickness to promote and protect the good health of the patients at the Bell Surgery, by the provision of funds to purchase equipment and services not provided by the NHS and to deliver other support to patients including informal health workshops. The Trust Fund remains dependent upon the generous donations made by patients.

Classification

- **How:** Makes Grants To Organisations, Provides Advocacy/advice/information
- **What:** The Advancement Of Health Or Saving Of Lives, Disability
- **Who:** Children/young People, Elderly/old People, People With Disabilities

Geography

- Oxfordshire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£5,851	£1,535	-	-
2024-03-31	£3,445	£1,446	-	-

Trustees

Name	Role	Appointed
Elizabeth James	Chair	2022-08-24
Dr Chris Langley		2022-08-24
Dr Peter Reynolds		2022-08-24
Janet Waters		2022-08-24
Richard Pinches		2024-03-03

THE BELL SURGERY CHARITABLE TRUST

England & Wales - Charity number 1200727

Accounts



Trustees' Annual Report for the period

From **1 April 2024** To **31 March 2025**

Charity name: The Bell Surgery Charity Trust

Charity registration number: 1200727

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The objective of the Trust is to relieve sickness to promote and protect the good health of the patients at the Bell Surgery, by the provision of funds to purchase equipment and services not provided by the NHS and to deliver other support to patients including informal health workshops. The Trust Fund remains dependent upon the generous donations made by patients.
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	The trust has received a number of donations through the publicity in the surgery and by participating in the local Living Advent Calendar event
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have had regard to the guidance issued by the Charity Commission on public benefit when planning activities

Achievements and Performance

	SORP reference	
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<p>Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.</p>	<p>Para 1.20</p>	<p>The charity has almost doubled the number and value of donations, begun to receive some regular donations and started a campaign to target funding from local businesses and grant making bodies. Grants to the surgery have been limited this year as a number of larger projects have been identified for which new campaigns have been launched.</p>
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Financial Review

<p>Review of the charity's financial position at the end of the period</p>	<p>Para 1.21</p>	<p>The charity has made a larger surplus in the year enabling costs borne by the Surgery to be repaid. Funds at the year end have more than doubled placing the charity in a sound financial position.</p>
<p>Statement explaining the policy for holding reserves stating why they are held</p>	<p>Para 1.22</p>	<p>Not applicable</p>
<p>Amount of reserves held</p>	<p>Para 1.22</p>	<p>£4730</p>
<p>Reasons for holding zero reserves</p>	<p>Para 1.22</p>	<p>Not applicable</p>
<p>Details of fund materially in deficit</p>	<p>Para 1.24</p>	<p>Not applicable</p>
<p>Explanation of any uncertainties about the charity continuing as a going concern</p>	<p>Para 1.23</p>	<p>The charity has continued to grow since March 2025 and is nearing it's target for it's first major fundraising.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

<p>The charity's principal sources of funds (including any fundraising)</p>	<p>Para 1.47</p>	<p>Patient donations</p>
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Structure, Governance and Management

<p>Description of charity's trusts:</p>		
<p>Type of governing document</p>	<p>Para 1.25</p>	<p>CIO dated 18 October 2022</p>

(trust deed, royal charter)		
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	By appointment of the Board of Trustees

Reference and Administrative details

Charity name	The Bell Surgery Charity Trust
Other name the charity uses	
Registered charity number	1200727
Charity's principal address	THE BELL SURGERY YORK ROAD HENLEY-ON-THAMES RG9 2DR

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Elizabeth James	Chair		
2	Melvyn Keen	Treasurer		
3	Janet Waters	Secretary		
4	Dr Peter Reynolds			
5	Dr Chris Langlely			
6	Richard Pinches			
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Corporate trustees – names of the directors at the date the report was approved

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	Not applicable
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	Not applicable

Exemptions from disclosure

Reason for non-disclosure of key personnel details

No personnel


Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Melvyn Keen	
Position (eg Secretary, Chair, etc)	Treasurer	
Date	17 December 2025	



CHARITY COMMISSION
FOR ENGLAND AND WALES

The Bell Surgery Trust

1200727

Receipts and payments accounts

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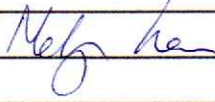
For the period from	01-Apr-24	To	31-Mar-25
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations	5,841	-	-	5,841	3,445
Interest	10	-	-	10	-
	-	-	-	-	-
Sub total (Gross income for AR)	5,851	-	-	5,851	3,445
A2 Asset and investment sales, (see table).					
Start up loan from Surgery	500	-	-	500	500
	-	-	-	-	-
Sub total	500	-	-	500	500
Total receipts	5,351	-	-	5,351	3,945
A3 Payments					
Surgery Equipment and Fittings	262	-	-	262	1,446
Trustee insurance (3 years premiums)	1,069	-	-	1,069	-
Bank and Just Giving fees	204	-	-	204	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	1,535	-	-	1,535	1,446
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	1,535	-	-	1,535	1,446
Net of receipts/(payments)	3,816	-	-	3,816	2,499
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	2,499	-	-	2,499	-
Cash funds this year end	6,315	-	-	6,315	2,499

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bank Accounts	6,315	-	-
		-	-	-
		-	-	-
	Total cash funds	6,315	-	-
(agree balances with receipts and payments account(s))		OK	OK	OK
B2 Other monetary assets	Details	-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
	Initial costs paid by Bell Surgery	Unrestricted		
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval
		Melvyn Keen	17-Dec-25

THE BELL SURGERY CHARITABLE TRUST

England & Wales - Charity number 1200727

Accounts

Achievements and Performance

	SORP reference	
<p>Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.</p>	<p>Para 1.20</p>	<p>Firstly, we established the infrastructure to enable the Charity to function, this in itself was a lengthy process.</p> <p>Once funding was available the Charity provided an updated Information system for patients in the waiting room. This provided information on a screen about services offered at the surgery and in the community and general healthcare information.</p> <p>Five blood pressure monitors were purchased. These are available on loan to patients who are required to take their blood pressure at home regularly. They are then returned at the end of that period. This frees up appointments for other patients. This proved very popular and the loaned-out monitors are being returned in a timely manner.</p> <p>The next purchase made by the Surgery with money donated by the Bell Surgery Charitable Trust was of two reconditioned wheelchairs. These are for transportation of patients if necessary to the Urgent Care Unit in the hospital adjacent to the surgery.</p> <p>The number of patients served by the Bell Surgery, and the resultant number of health care professionals using the facilities has increased dramatically in recent years. In addition to GPs, space has to be found for Community Pharmacists and the Social Prescriber as well. As a result, there is a serious shortage of space for patient consultations. Patient's paper files containing important health information which has not been transferred to electronic files must be kept and be available throughout the life of the patient. The files took up a large amount of space in the staff meeting room. The Charity paid for a storage system for the files to be kept on a mezzanine floor. The room was then divided into two parts, leaving a smaller meeting room and an additional consultation room. The cost of the building work and necessary furniture and equipment was met by the Surgery.</p> <p>Future Plans include fundraising for a monitor for the lobby. This is an expensive piece of equipment which patients can use independently during surgery hours to measure their height, weight and blood pressure.</p>

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Elizabeth James	Chair		
2	Melvyn Keen	Treasurer	From 5 Oct 23	
3	Janet Waters	Secretary		
4	Dr Peter Reynolds			
5	Dr Chris Langley			
6	Richard Pinches		From 3 March 24	
7	John Greig		Until 16 Nov 23	
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Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The charity has made a small surplus of £1999 in this first year of operation but relied on loans from the surgery to establish itself.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Not applicable
Amount of reserves held	Para 1.22	£32
Reasons for holding zero reserves	Para 1.22	Not applicable
Details of fund materially in deficit	Para 1.24	Not applicable
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	The charity has thrived since the March 24 year end and is a going concern.

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Patient donations
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Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	CIO dated 18 October 2022
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	By appointment of the Board of Trustees

Reference and Administrative details

Charity name	The Bell Surgery Charity Trust
Other name the charity uses	
Registered charity number	1200727
Charity's principal address	THE BELL SURGERY YORK ROAD HENLEY-ON-THAMES RG9 2DR

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	Not applicable
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	Not applicable

Exemptions from disclosure

Reason for non-disclosure of key personnel details

No personnel

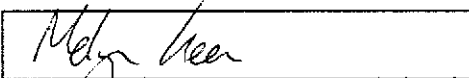
Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Melvyn Keen	
Position (eg Secretary, Chair, etc)	Treasurer	

Date 6 January 2025



CHARITY COMMISSION
FOR ENGLAND AND WALES

The Bell Surgery Trust 1200727

Receipts and payments accounts

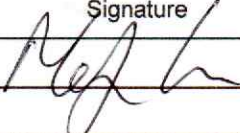
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For the period from 18-Oct-22 To 31-Mar-24

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations	3,445	-	-	3,445	-
Sub total (Gross income for AR)	3,445	-	-	3,445	-
A2 Asset and investment sales, (see table).					
Start up loan from Surgery	500	-	-	500	-
Sub total	500	-	-	500	-
Total receipts	3,945	-	-	3,945	-
A3 Payments					
Surgery Equipment and Fittings	1,446	-	-	1,446	-
Sub total	1,446	-	-	1,446	-
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	1,446	-	-	1,446	-
Net of receipts/(payments)	2,499	-	-	2,499	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	2,499	-	-	2,499	-

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Bank Account	2,499	-	-
		-	-	-
		-	-	-
	Total cash funds <small>(agree balances with receipts and payments account(s))</small>	2,499	-	-
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
B3 Investment assets		Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
B4 Assets retained for the charity's own use		Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
B5 Liabilities		Fund to which liability relates	Amount due (optional)	When due (optional)
	Initial costs paid by Bell Surgery	Unrestricted		
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
		Melvyn Keen	06-Jan-25	