

Trustee Annual Report

Three grants for action research were made in the period, each focusing on the student experience: on how psychotherapeutic theory and practice can support students in residential settings; and both academic and pastoral mentoring. Further applications reflect the continued importance of work to improve inclusion in boarding schools. The BSA Foundation is providing a vehicle to connect boarding practitioners working in different settings to share and spread best practice, including those who have not yet been awarded a research grant.

The Foundation is now working in association with The Institute for Boarding, also part of the BSA Group, to assess applications for the BSA Research Fellowship, awarded for the first time in 2025 to a researcher in a South African residential school analysing students' experience of conformity in a residential setting and how this can be best managed. The researcher presented their findings at the annual boarding conference in January 2026. This was well received, raising awareness of both the Foundation and the Fellowship.

The charity's assets have grown to £39k enabling financial security and to enable trustees to think more strategically about commissioning research to benefit schools within residential settings in addition to awarding grants for action research after the annual applications process. The charity is also looking to increase the number of trustees to reflect the international diversity of residential schools and to strengthen expertise in research in order to provide advice to those engaged in putting forward applications and in the process of research.

Section A Receipts and payments

A1 Receipts
The BSA Group Ltd

Sub total(Gross income for AR)

A2 Asset and investment sales, (see table).

Sub total

Total receipts

A3 Payments
Service Charges (Unity Bank)
Katie Phillips (Grant)

Sub total

A4 Asset and investment purchases, (see table)

Sub total

Total payments

Net of receipts/(payments)
A5 Transfers between funds
A6 Cash funds last year end
Cash funds this year end

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

Categories

B1 Cash funds

B2 Other monetary assets

B3 Investment assets

B4 Assets retained for the charity's own use

B5 Liabilities

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

BSA Foundation

Receipts and payments accounts
For the period from

01/09/24

Unrestricted funds
to the nearest 

Restricted funds
to the nearest 

	40000	-
-		-
-		-
-		-
-		-
-		-
-		-
	40000	-
-		-
-		-
-		-
	40000	-
	62	-
	900	-
-		-
-		-
-		-
-		-
-		-
-		-
-		-
	962	-
-		-
-		-
-		-
	962	-
	39038	-
-		-
-		-
	39038	-

Details

Funds in bank

Total cash funds
(agree balances with receipts and payments account(s))

Details

Details

Details

Details

Signature

1202199

CC16a

To

31/08/2025

Endowment funds
to the nearest Total funds
to the nearest Last year
to the nearest 

-	40000	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	40000	-
-	-	-
-	-	-
-	40000	-
-	62	-
-	900	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	962	-
-	-	-
-	-	-
-	962	-
-	39038	-
-	-	-
-	39038	-

Unrestricted funds
to nearest 

- 39038

-

-

39038

OK
Unrestricted funds
to nearest 

-

-

-

-

-

-

Restricted funds
to nearest 

-

-

-

OK
Restricted funds
to nearest 

-

-

-

-

-

-

Endowment funds
to nearest 

-

-

-

OK
Endowment funds
to nearest 

-

-

-

-

-

-

Fund to which asset belongs

Cost (optional)

-

-

-

-

-

Current value (optional)

-

-

-

-

-

Fund to which asset belongs

Cost (optional)

-

-

-

-

-

-

-

-

Current value (optional)

-

-

-

-

-

-

-

-

Fund to which liability relates

Amount due (optional)

-

-

-

-

-

When due (optional)

Print Name
Martin Sheldon Reader

Date of approval
01/06/26



Section A

Independent Examiner's Report

Report to the trustees

Charity Name
BSA Foundation

On accounts for the year
ended

31st August 2025

Charity no
(if any)

1202199

Set out on pages

CC16a pages 1-2
Trustees report pages 1-8

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/08/2025.

Responsibilities and
basis of report

As the charity's trustees, 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 all 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 in connection with the examination gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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 in order to enable a proper understanding of the accounts to be reached.

Signed:

Date:

01 June 2026

Name:

Suzanne Wood

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

ICAEW

Address:

30-32 Gildredge Road

Eastbourne

BN21 4SH

Section B**Disclosure**

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From **01/09/2024** Period start date To **31/08/2025** Period end date

Charity name: BSA Foundation

Charity registration number: 1202199

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The Charity's objective is the advancement of education for the public benefit to improve the lives of children and young people in residential educational settings by the funding of 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	The objects of the CIO are the advancement of education for the public benefit to improve the lives of children and young people in residential educational settings by the funding of research, including, but not by way of limitation, into: (A) improving and enhancing anti-racism, diversity, equality and inclusion education; (B) sexual consent education; (C) the provision of mentoring, training and other assistance; (D) mental health in residential educational settings; and (E) the benefits of the provision of physical, educational, mental health and other activities.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	This confirms the trustees have had regard to the guidance issued by the Charity Commission on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	

Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	Three grants for action research were made in the period, each focusing on the student experience: on how psychotherapeutic theory and practice can support students in residential settings; and both academic and pastoral mentoring. Further applications reflect the continued importance of work to improve inclusion in boarding schools. The BSA Foundation is providing a vehicle to connect boarding practitioners working in different settings to share and spread best practice, including those who have not yet been awarded a research grant. The Foundation is now working in association with The Institute for Boarding, also part of the BSA Group, to assess applications for the BSA Research Fellowship, awarded for the first time in 2025 to a researcher in a South African residential school analysing students' experience of conformity in a residential setting and how this can be best managed. The researcher presented their findings at the annual boarding conference in January 2026. This was well received, raising awareness of both the Foundation and the Fellowship. The charity's assets have grown to £39k enabling financial security and to enable trustees to think more strategically about commissioning research to benefit schools within residential settings in addition to awarding grants for action research after the annual applications process. The

		charity is also looking to increase the number of trustees to reflect the international diversity of residential schools and to strengthen expertise in research in order to provide advice to those engaged in putting forward applications and in the process of research.
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The BSA Foundation holds funds of £39,038 at year end.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Grants will be paid out of reserves in future periods when they are agreed.
Amount of reserves held	Para 1.22	£39,038
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	The trustees consider the charity to be 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	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Apart from the first charity trustees, every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees. Trustees may be reappointed by a resolution passed at a properly convened meeting of the charity trustees for a maximum of three terms. In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.

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	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	BSA Foundation	
Other name the charity uses		
Registered charity number	1202199	
Charity's principal address	167-169 Great Portland Street London W1W 5PF	

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	Martin Reader	Chair		
2	Andrew Nott	Trustee		
3	Matthew Robinson	Trustee		
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				

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

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

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	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

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

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Martin Sheldon Reader	
Position (eg Secretary, Chair, etc)	Chair	
Date	29 May 2026	



Receipts and payments accounts

CC16a

For the period
from

01/09/2024

To

31/08/2025

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					
The BSA Group Ltd	40,000	-	-	40,000	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	40,000	-	-	40,000	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	40,000	-	-	40,000	-
A3 Payments					
Service Charges (Unity Bank)	62	-	-	62	-
Katie Phillips (Grant)	900	-	-	900	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	962	-	-	962	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	962	-	-	962	-
Net of receipts/(payments)	39,038	-	-	39,038	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	39,038	-	-	39,038	-

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	Funds in bank	39,038	-	-
		-	-	-
		-	-	-
	Total cash funds	39,038	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

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

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
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 liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval
		Martin Sheldon Reader	01/06/2026