



Spiritual Direction Forum UK

Trustees' Annual Report for the period

From 23 April 2024 to 31 December 2024

Charity registration number: 1207982

Charity name	SPIRITUAL DIRECTION FORUM UK
Other name the charity uses	sdforum.uk
Registered charity number	1207982
Charity's principal address	1 Targets Mead Tisbury SP2 6SR

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Appointed	Retired / Resigned
1	Julie Dunstan	Co-Chair	24/4/2024	
2	Nicholas Helm	Co-Chair	24/4/2024	
3	Ruth Holgate		24/4/2024	
4	Catherine Williams		24/4/2024	
5	Susanne Carlsson		24/4/2024	
6	Audrey Hamilton		24/4/2024	26 July 2024

Objectives and Activities

The purposes of the charity are: To advance the Christian faith for the benefit of the public by promoting awareness and understanding of the practice of "Spiritual Direction", defined as help given by one person (a "Spiritual Director") to another informed by (but not limited to) a Christian understanding which enables that person to pay attention to God's personal communication to them, to respond to this personally communicating God, to grow in intimacy with this God, and to live out the consequences of the relationship.

Its main activities relate to the six objectives in the constitution:

- promoting and protecting good practice of Spiritual Direction;
- enabling, advocating and encouraging the development and availability of Spiritual Direction within all denominations of the Christian church and the wider world.
- developing, providing and promoting resources for the understanding, articulation and development of good practice of Spiritual Direction;
- facilitating means to collaborate with others in the discussion and development of such good practice;
- encouraging and promoting clear guidelines and resources for good practice within Spiritual Direction; and

- f. creating and promoting training opportunities for the practice and development of Spiritual Direction.

The trustees have had regard to the Charity Commission's guidance on public benefit for its activity.

All of the work of the charity in 2024 was dependant on volunteers who have led events, participated in the subgroups that have organised online events and participated in consultations and activities.

Structure, Governance and Management

The charity is governed by its Constitution.

The charity is a Charitable Incorporated Organisation.

Trustees are appointed by the Committee.

There are three sub-committees, which hold responsibility for organising and developing particular areas of the charities objectives. A wider network of people interested in the Charity's work is comprised of people who have signed up to receive mailings and those who have participated in our online events.

Achievements and Performance

Following the establishing of the Charity in April 2024, the committee has continued to develop its activities to fulfil its purposes to promote awareness and understanding of Spiritual Direction through:

- **hosting a website** www.sdforum.uk which promotes our purposes and activities.
- **circulation of information about the charity** and its activities and invitations to participate. There were three general mailings between May and November 2024. The mailing list has grown from 364 in May to 1017 in November.
- **holding of online events:** Five online events were held between April and December 2024. Total number of bookings for these events was 590. All of these events related to our objectives (a) – (f).

Financial Review

This first period of the Charity's operation, began with a deposit of £450.79 from donations prior to becoming a charity. Donations through the remaining part of 2024 totalled £479.80. Expenditure through 2024 totalled £378.31, leaving an end of year credit balance of £553.16.

No reserves are currently held. The policy is to build up reserves in the next three years, so that there is sufficient in the reserves to cover 50% of the annual running costs.

Thus far, the donations received have been more than sufficient to cover the running costs.

Donations from supporters provide the primary sources of funds. These are primarily individuals. We received a grant from the Annunciation Trust of £250.

At present there are no significant financial risks for the charity. Donations in support of its work are greater than its financial commitments.

Spiritual Direction Forum UK

Charity Number 1207982

Receipts and Payments Accounts for the year ended 31.12.2024

	Note	Unrestricted 2024 £	Restricted 2024 £	Total 2024 £
Receipts				
Donations	1	930.59	0.00	930.59
Bank Interest		0.88	0.00	0.88
		<u>931.47</u>	<u>0.00</u>	<u>931.47</u>
Payments				
Payments relating to charitable activities	2	253.31	0.00	253.31
Governance costs	3	125.00	0.00	125.00
		<u>378.31</u>	<u>0.00</u>	<u>378.31</u>
Surplus for the year		<u>553.16</u>	<u>0.00</u>	<u>553.16</u>

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Balance Sheet as at 31.12.2024

	Note	Unrestricted 2024	Restricted 2024	Total 2024
Funds Held				
Opening Balance		0	0	0
Surplus for the year		533.16	0.00	533.16
Balance at end of period	4	533.16	0.00	533.16
Assets				
Bank account		533.16	0.00	533.16
Cash		0.00	0.00	0.00
Bank balance at end of period		533.16	0.00	533.16

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Notes to the Accounts for the year ended 31.12.2024

	Unrestricted 2024 £	Restricted 2024 £	Total 2024 £
1 Donations			
Individual Donations	680.59	0.00	680.59
Annunciation Trust	250.00	0.00	250.00
	<u>930.59</u>	<u>0.00</u>	<u>930.59</u>
2 Payments relating to charitable activities			
Website & IT costs	<u>253.31</u>	<u>0.00</u>	<u>253.31</u>
3 Governance Costs			
Meeting Room Hire	80.00	0.00	80.00
Training	45.00	0.00	45.00
	<u>125.00</u>	<u>0.00</u>	<u>125.00</u>
4 Fund Balances	The year's surplus of £533.16 is held as an unrestricted fund.		

Independent Examiner's report to the Trustees of the Spiritual Direction Forum UK

I report to the trustees on my examination of the accounts of the Spiritual Direction Forum UK (the Trust) for the year ended 31 December 2024.

Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under S.145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under s.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 giving me cause to believe that in any material respect:

- 1) Accounting records were not kept in respect of the Trust as required by S.130 of the Act: or
- 2) The accounts do not accord with those records.

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.

David Booker FCA
Chartered Accountant
18 September 2025

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

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Full name(s)

Nicholas Helm	Julie Dunstan
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Position

Co-Chair	
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Date

18 September 2025
