

## Trustees' Annual Report for the period

From 1<sup>st</sup> July 2024 Period start date To 31<sup>st</sup> July 2025 Period end date

Charity name: Northern Diaconal Formation Partnership

Charity registration number: 1208913

### Objectives and Activities

|                                                                                                                                                                      | SORP reference     |                                                                                                                                                                                                                                                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Summary of the purposes of the charity as set out in its governing document                                                                                          | Para 1.17          | To advance the Catholic religion for the public benefit by supporting Catholic education and ministry including promoting the formation of deacons.                                                                                             |
| 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 | NDFP will provide training and support to those in formation for the Permanent Diaconate in the Catholic Church. This will involve residential sessions and marked assignments. Support and feedback will be given to sponsoring organisations. |
| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit                                         | Para 1.18          | The trustees confirm that they have referred to the Charity Commission's guidance 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      | Not applicable |
| Policy on social investment including program related | Para 1.38      | Not applicable |

|                                 |           |                                                                       |
|---------------------------------|-----------|-----------------------------------------------------------------------|
| investment                      |           |                                                                       |
| Contribution made by volunteers | Para 1.38 | Support will be provided by volunteers from sponsoring organisations. |
| 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      | NDFP was set up on 1 <sup>st</sup> July 2024. It has spent the period up to 31 <sup>st</sup> July 2025 establishing its support and financial systems in order to take over provision administered by NDFP Limited until the latter date. |

### Additional information (optional)

You may choose to include further statements where relevant about:

|                                     |           |                                                                                                           |
|-------------------------------------|-----------|-----------------------------------------------------------------------------------------------------------|
| Achievements against objectives set | Para 1.41 | From 1 <sup>st</sup> August 2025 NDFP commenced operations                                                |
| Performance of fundraising          |           | Not relevant at this point. Funding will be provided by sponsoring bodies of students at an agreed level. |

|                                           |           |                            |
|-------------------------------------------|-----------|----------------------------|
| activities against objectives set         | Para 1.41 |                            |
| Investment performance against objectives | Para 1.41 | Not relevant at this stage |
| Other                                     |           |                            |

## Financial Review

|                                                                                  |           |                                                                              |
|----------------------------------------------------------------------------------|-----------|------------------------------------------------------------------------------|
| Review of the charity's financial position at the end of the period              | Para 1.21 | At the end of the first reporting period no income or expenditure to report. |
| Statement explaining the policy for holding reserves stating why they are held   | Para 1.22 | To be agreed                                                                 |
| Amount of reserves held                                                          | Para 1.22 | Nil                                                                          |
| Reasons for holding zero reserves                                                | Para 1.22 | Not yet operating                                                            |
| 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 | No concerns                                                                  |

## 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<br>(trust deed, royal charter)                                                                                                                 | Para 1.25 | Foundation Constitution                                                                                                                                                                |
| How is the charity constituted?<br>(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 | Trustees are nominated by the respective Bishops of the following Roman Catholic dioceses: Hallam, Hexham & Newcastle, Lancaster, Leeds, Liverpool, Middlesbrough, Salford and Wrexham |

### 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                | Northern Diaconal Formation Partnership                                                                                             |
| Other name the charity uses | NDFP                                                                                                                                |
| Registered charity number   | 1208913                                                                                                                             |
| Charity's principal address | ARCHDIOCESE OF LIVERPOOL<br>St Margaret Clitherow Centre<br>LIVERPOOL ARCHDIOCESAN OFFICE<br>CROXTETH DRIVE<br>LIVERPOOL<br>L17 1AA |
|                             |                                                                                                                                     |

## 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 | Rev Christopher Anthony Fallon        | Chair           |                                   | RC Archdiocese of Liverpool                                   |
|  | 2 | Rev Deacon Michael Schoonjans MA Hons |                 |                                   | RC Diocese of Wrexham                                         |
|  | 3 | Rev Shaun David McGee                 |                 |                                   | RC Diocese of Hexham & Newcastle                              |
|  | 4 | Stephen Robert Scott                  |                 |                                   | RC Diocese of Salford                                         |
|  | 5 | Anthony John Strike                   |                 |                                   | RC Diocese of Hallam                                          |
|  | 6 | David Neils Arblaster                 |                 |                                   | RC Diocese of Leeds                                           |
|  | 7 | Rev. Dr. Bernard Farrell-Roberts      |                 |                                   | RC Diocese of Lancaster                                       |
|  | 8 | Rev. Alan                             |                 | 1 <sup>st</sup> July 2024 to      | RC Diocese of Middlesbrough                                   |

|  |   |          |  |                               |
|--|---|----------|--|-------------------------------|
|  |   | Sheridan |  | 10 <sup>th</sup> January 2025 |
|  | 9 |          |  |                               |
|  | 1 |          |  |                               |
|  | 0 |          |  |                               |
|  | 1 |          |  |                               |
|  | 1 |          |  |                               |
|  | 2 |          |  |                               |
|  | 1 |          |  |                               |
|  | 3 |          |  |                               |
|  | 1 |          |  |                               |
|  | 4 |          |  |                               |
|  | 1 |          |  |                               |
|  | 5 |          |  |                               |
|  | 1 |          |  |                               |
|  | 6 |          |  |                               |
|  | 1 |          |  |                               |
|  | 7 |          |  |                               |
|  | 1 |          |  |                               |
|  | 8 |          |  |                               |
|  | 1 |          |  |                               |
|  | 9 |          |  |                               |
|  | 2 |          |  |                               |
|  | 0 |          |  |                               |

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 |  |
|--------------|-----------------------------------|--|
|              |                                   |  |
|              |                                   |  |
|              |                                   |  |
|              |                                   |  |

|  |  |  |
|--|--|--|
|  |  |  |
|  |  |  |

## Funds held as custodian trustees on behalf of others

|                                                                                                                               |                |
|-------------------------------------------------------------------------------------------------------------------------------|----------------|
| Description of the assets held in this capacity                                                                               | Not applicable |
| 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 |

## 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)

|  |  |
|--|--|
|  |  |
|--|--|

## Exemptions from disclosure

Reason for non-disclosure of key personnel details

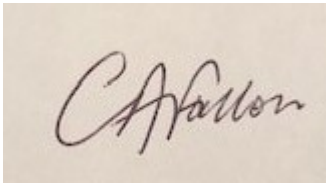
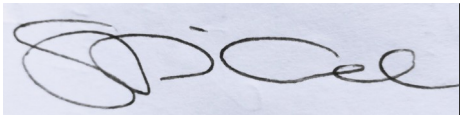
## Other optional information

|  |
|--|
|  |
|--|

Declarations

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

Signed on behalf of the charity’s trustees

|  |                                            |                                                                                   |                                                                                     |
|--|--------------------------------------------|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|  | <b>Signature(s)</b>                        |  |  |
|  |                                            |                                                                                   |                                                                                     |
|  | <b>Full name(s)</b>                        | Rev Christopher Anthony Fallon                                                    | Rev Shaun David McGee                                                               |
|  |                                            |                                                                                   |                                                                                     |
|  | <b>Position (eg Secretary, Chair, etc)</b> | Chair                                                                             | Trustee                                                                             |
|  |                                            |                                                                                   |                                                                                     |
|  | <b>Date</b>                                | 20 <sup>th</sup> May 2026                                                         |                                                                                     |



CHARITY COMMISSION  
FOR ENGLAND AND WALES

|                                         |             |
|-----------------------------------------|-------------|
| Charity Name                            | No (if any) |
| Northern Diaconal Formation Partnership | 1208913     |

## Receipts and payments accounts

CC16a

|                        |                               |    |                              |
|------------------------|-------------------------------|----|------------------------------|
| For the period<br>from | Period start date<br>1/7/2024 | To | Period end date<br>31/7/2025 |
|------------------------|-------------------------------|----|------------------------------|

### Section A Receipts and payments

|                                                           | Unrestricted<br>funds<br>to the nearest £ | Restricted<br>funds<br>to the nearest £ | Endowment<br>funds<br>to the nearest £ | Total funds<br>to the nearest £ | Last year<br>to the nearest £ |
|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------|----------------------------------------|---------------------------------|-------------------------------|
| <b>A1 Receipts</b>                                        |                                           |                                         |                                        |                                 |                               |
| No income in period                                       | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b> (Gross income for AR)                    | -                                         | -                                       | -                                      | -                               | -                             |
| <b>A2 Asset and investment sales,<br/>(see table).</b>    |                                           |                                         |                                        |                                 |                               |
| No assets held in period                                  | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b>                                          | -                                         | -                                       | -                                      | -                               | -                             |
| <b>Total receipts</b>                                     | -                                         | -                                       | -                                      | -                               | -                             |
| <b>A3 Payments</b>                                        |                                           |                                         |                                        |                                 |                               |
| No payments made in period                                | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b>                                          | -                                         | -                                       | -                                      | -                               | -                             |
| <b>A4 Asset and investment<br/>purchases, (see table)</b> |                                           |                                         |                                        |                                 |                               |
| No assets held in period                                  | -                                         | -                                       | -                                      | -                               | -                             |
|                                                           | -                                         | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b>                                          | -                                         | -                                       | -                                      | -                               | -                             |
| <b>Total payments</b>                                     | -                                         | -                                       | -                                      | -                               | -                             |
| <b>Net of receipts/(payments)</b>                         | -                                         | -                                       | -                                      | -                               | -                             |
| <b>A5 Transfers between funds</b>                         | -                                         | -                                       | -                                      | -                               | -                             |
| <b>A6 Cash funds last year end</b>                        | -                                         | -                                       | -                                      | -                               | -                             |
| <b>Cash funds this year end</b>                           | -                                         | -                                       | -                                      | -                               | -                             |

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

| Categories                                                  | Details                                                | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>to nearest £ |
|-------------------------------------------------------------|--------------------------------------------------------|------------------------------------|----------------------------------|---------------------------------|
| <b>B1 Cash funds</b>                                        | No assets held in period                               | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             | <b>Total cash funds</b>                                | -                                  | -                                | -                               |
|                                                             | (agree balances with receipts and payments account(s)) | OK                                 | OK                               | OK                              |
| <b>B2 Other monetary assets</b>                             | Details                                                | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>to nearest £ |
|                                                             | No assets held in period                               | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
|                                                             |                                                        | -                                  | -                                | -                               |
| <b>B3 Investment assets</b>                                 | Details                                                | Fund to which asset belongs        | Cost (optional)                  | Current value (optional)        |
|                                                             | No assets held in period                               |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
| <b>B4 Assets retained for the charity's own use</b>         | Details                                                | Fund to which asset belongs        | Cost (optional)                  | Current value (optional)        |
|                                                             | No assets held in period                               |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
|                                                             |                                                        |                                    | -                                | -                               |
| <b>B5 Liabilities</b>                                       | Details                                                | Fund to which liability relates    | Amount due (optional)            | When due (optional)             |
|                                                             | No assets held in period                               |                                    | -                                |                                 |
|                                                             |                                                        |                                    | -                                |                                 |
|                                                             |                                                        |                                    | -                                |                                 |
|                                                             |                                                        |                                    | -                                |                                 |
| Signed by one or two trustees on behalf of all the trustees | Signature                                              | Print Name                         | Date of approval                 |                                 |
|                                                             | C A Fallon                                             | Rev Christopher Anthony Fallon     | 20-May-26                        |                                 |

|         |                       |           |
|---------|-----------------------|-----------|
| #VALUE! | Rev Shaun David McGee | 20-May-26 |
|---------|-----------------------|-----------|