

# Annual Report

## 2022-2023



**Making a difference to the lives of people with severe learning disabilities whose behaviour challenges.**

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# Foreword

## From our Chair, Diane Lightfoot

Last year marked 25 years since the Challenging Behaviour Foundation was founded. It was started and is still led by a parent of a child with a severe learning disability who displays a range of behaviours described as challenging, because there was no one organisation focused on supporting this group of marginalized families. Knowledge and information was out there, but not getting through to the people who needed it the most, especially families. The Challenging Behaviour Foundation was formed to fill this gap.

From its roots and to the current day, the CBF develops and delivers its activities and priorities based on families' experiences. The families we have contact with will often provide a lifetime of love and support. The "system" to access services and support remains complex and disjointed – education, health and social care, and the legal and regulatory frameworks are complicated to navigate and to challenge when the right support is not available or forthcoming. Our work is diverse – reflecting the diversity of issues families face – and we aim to provide a holistic approach to all our work, doing what is needed, not what is easiest or administratively convenient for the CBF.

We have reflected on how much we have achieved over the past 25 years and how far there is still to go for children, young people and adults with severe learning disabilities whose behaviour challenges and their families to get the right support in the right place at the right time.

The learning disability landscape is tough, and our resources are limited so we continually evaluate our impact to confirm that we are "making a difference" at a grass roots, local and national level. The positive feedback and kind words we receive from families we have supported encourages and inspires us to continue our work with them. As a small charity with limited resources, we cannot fix a broken system, but we can support families to navigate it and strategically influence those who can change policy and practice. We do this through co-production and working collaboratively, bringing people together to drive change, and truly valuing and acting on the experience of knowledge of family carers. We are also progressing our work with partners to proactively seek ways to gather the views and experiences of individuals with complex communication challenges themselves.

As we emerge from the pandemic and various lockdowns, we have seen an increase in both the number and complexity of enquiries we receive from families and the professionals who support them. In addition, with the current cost of living crisis, sadly we expect this increase to continue for some time to come. This will bring challenges to the CBF and Trustees plan carefully to ensure our much-needed work can continue.

We as Trustees are very proud of all our staff, volunteers and supporters who consistently go above and beyond to promote the rights of, and provide the best possible support to, children, young people and adults with severe learning disabilities whose behaviour challenges, and to their families and those who support them.



**Thank you to everyone who has made a difference this year.**

.....

**Diane Lightfoot, Chair of Trustees**



**The support the CBF have given me over the years has been second to none. I really don't know how I would have coped without your continuous support with all the battles that I've been put up against**

**- Family Carer**

# Report of the Trustees

## For the year ended 31 January 2023

The Trustees who are also the directors of the charity for the purposes of the Companies Act 2006, present their report with the financial statements of the charity for the year ended 31 January 2023. The Trustees have adopted the provisions of the Statement of Recommended Practice (SORP) 'Accounting and Reporting by Charities' issued in 2015.

## Objectives and activities

### Objectives and aims

The Challenging Behaviour Foundation (CBF) exists to improve the quality of life of children, young people and adults with severe learning disabilities whose behaviour challenges, and their families.



**Our vision** is for all children, young people and adults with severe learning disabilities whose behaviour challenges, to have the right support and opportunities to live full and active lives.



**Our mission** is to make a difference to the lives of children, young people and adults with severe learning disabilities whose behaviour challenges, and their families by: -

- Championing their rights
- Ensuring timely information and support
- Raising awareness and understanding
- Promoting and sharing best practice

We are the **only** UK charity **focussed specifically** on the needs of children, young people and adults with a severe learning disability whose behaviours may challenge, their families and those who care for them.

The term ‘challenging behaviour’ first came into widespread use in the UK through a publication by the King’s Fund Centre. This clearly explained that the term: ‘...emphasises that such behaviour represents challenges to services rather than problems that individuals with learning disabilities in some way carry around with them. If services could rise to the “challenge” of dealing with these behaviours, they would cease to be “problems”. The term challenging behaviour places the focus of discussion on services rather than on the individuals showing the behaviours.

The NHS estimates that there are between 30,000 and 35,000 people in the UK who have a severe learning disability and are at risk of developing behaviours that challenge. A person with a severe learning disability will have little or no speech, find it difficult to learn new skills and need ongoing support to carry out daily activities such as washing and dressing.

Challenging behaviour has a **formal definition** and is a term used to refer to a variety of behaviours which some people with a learning disability may display. These behaviours vary and include aggression, eating inedible objects, severe self-injury or significant obsessive repetition, typically putting the safety of the person or others at risk and/or restricting their access to ordinary life opportunities.

Without appropriate support, children, young people and adults with severe learning disabilities whose behaviour may challenge find themselves at greater risk of poor healthcare, poor life prospects and at greater risk of abuse. Families often find themselves isolated from their local community, unsupported by local services and separated from their relatives.

Our work focuses on family-led carer support and adopts a Positive Behaviour Support (PBS) approach.

**30,000+**  
**in the UK**  
who have a severe  
learning disability and  
are at risk of developing  
challenging behaviours



**People whose behaviour challenges have the same needs as everyone else, in addition to special needs for help to overcome the problems their behaviour presents. They do not surrender their needs for personal relationships, for growth and development or for anything else because their behaviour presents a challenge to services. They have the same human rights as everyone else.**

**– Mansell 2, 2007**



Our objectives are to ensure that with good support each individual is able to live a happy, active life in their community with access to healthcare, employment, leisure and education, as well as a fulfilling family life. Our focus is enabling children, young people and adults to exercise their rights to participate in ordinary life opportunities through a proper understanding of their behaviour and access to appropriate support.

To meet these objectives, we have identified and prioritised three interconnected main areas of need: **'information and support'**, **'strategic influencing'** and **'sharing best practice'**, as described below in more detail. We build on, refine and enhance our work in these three areas as they have shown to be effective. More information about the work of the charity can be found on our website:



[www.challengingbehaviour.org.uk](http://www.challengingbehaviour.org.uk)



## How we work

As a small charity with limited resources, we carefully consider the impact of our work, and retaining our independence is fundamental. This year we carried out a formal Theory of Change exercise to review and confirm our overall aim and the steps we are taking to achieve it. We have identified four key communities across the lifespan where we can have the greatest impact on people's quality of life. These are:

- Early years – early intervention and prevention
- Transition – moving from child to adult services
- Older family carers – planning ahead
- Risk of crisis (at any age) – supporting families to get additional support to meet their relatives needs

We will particularly focus on these throughout our 3 areas of work: **'information and support'**, **'strategic influencing'** and **'sharing best practice'**.

Lived experience is embedded within the organisation and informs and shapes all our work. All our workshops are co-produced and co-delivered by a PBS professional and a family carer with lived experience, modelling the partnership approach we promote. This year we have built on our 'seldom heard' work with a new project to gather the views and experiences of individuals with learning disabilities and complex communication challenges to inform our policy work and influence at a national strategic level.



As an organisation we arrange our support and work around the needs of families rather than on what is administratively easier. The range and scope of our work is wide as it reflects the breadth and complexity of the systems and services that families have to navigate through to secure the support needed.

We adopt a lifelong human rights approach which spans education, health, and social care, using legal, policy and best practice frameworks to drive change at an individual and strategic level.

More can be achieved by working together. Although our focus is on supporting families, we know that working collaboratively with a range of other partners can achieve good outcomes. We therefore provide a range of information and support to professionals and families involved in supporting children and adults with severe learning disabilities whose behaviour challenges. In addition, this year we have co-produced new resources around whole family approaches and raising awareness of the trauma the system can cause to families.

In all our work, our approach is one of **'working with – not doing for'** as this shares knowledge and skills and promotes a sustained legacy. This is in alignment with our long-term goal which is there is no need for the CBF to exist because the system works for children, young people, adults, and their families to deliver the right support in the right place at the right time. It is this ultimate goal that shapes everything we do.



## Internships at the CBF

This year we have again been able to offer 2 internships at the CBF. We have now had 31 paid internships since 2011 covering Family Support, Policy, Research and Communications. Each internship is for one year and provides valuable experience in learning disability, working with a range of professionals in the field, and gives insight into the experience of family carers.

### Previous CBF interns have gone on to:

- Policy and communications roles in the voluntary and public sector
- Practitioner roles such as: social work, learning disability and mental health nursing and special needs teaching
- Further study at Masters and PhD level in related fields

We continue to have discussions to explore the development of our intern scheme through partnering with an academic centre and a support provider but due to capacity and other priorities we have not been able to progress this further. We remain hopeful that this is something we will be able to do in the future.

“

The CBF internship has been a brilliant introduction to working in the charity sector and to the field of learning disability. Right from the start I was given the opportunity to be meaningfully involved in the CBF's work and I've gained really valuable skills, knowledge and experiences. The CBF team are really supportive and their enthusiasm and knowledge is inspiring – I'd recommend this internship to anyone who's interested in working either in the field of learning disability or in the charity/policy sector more generally. – **CBF Intern**



The knowledge I have gained and experiences I have had during my internship at the CBF have been invaluable and I am so grateful. The whole team are amazingly kind and will ensure that you gain as much as possible during your time with them. – **CBF Intern**



## Objectives and activities Information and Support



**Lived experiences gathered from our information and support service drives our strategic influencing work which interconnects with sharing best practice.**

Our family support service offers a range of free, confidential, and expert resources to families including support delivered through:

- telephone helpline
- ongoing in-depth casework
- email information
- printed and filmed resources on a range of topics
- website information
- peer support networks including 'listening ear' calls with trained family carers, email networks, closed Facebook group and online carer catchups.

Further information on our family support service can be found here:



[www.challengingbehaviour.org.uk/for-family-carers/](http://www.challengingbehaviour.org.uk/for-family-carers/)

Information for professionals can be found here:



[www.challengingbehaviour.org.uk/for-professionals/](http://www.challengingbehaviour.org.uk/for-professionals/)



**Your resources are written so well, I didn't expect to find so much detailed information which I enjoy reading and find very useful, I really like and appreciate your holistic approach and describing challenging behaviour in a gentle helpful way, not scaring parents/carers. it means a lot for us to read your information and advice**

**– Family Carer**



## Objectives and activities Strategic Influencing



**Our strategic influencing work is informed by families lived experience gathered through our family support team and utilises examples of evidence-based best practice.**

Our strategic influencing work focusses on ensuring all parts of a complex system work well and deliver good outcomes for children, young people and adults with severe learning disabilities whose behaviour challenges and their families.

This work requires an understanding of the holistic context in a system that is often organisationally disjointed and fragmented.



**Supporting a child with severe learning disabilities whose behaviour is challenging on a daily basis is difficult enough – but added to that is the major challenge of trying to navigate your way through a disjointed and fragmented system to get support – it’s exhausting and relentless**

**– Family Carer**



We are solution focussed, believe more can be achieved by working together and facilitate joined up and collaborative working. We established and continue to chair the influential ‘Challenging Behaviour – National Strategy Group’ (CB-NSG), a unique multi- stakeholder group whose members include family carers, senior representatives from health, education and social care, government departments, regulators, service providers, clinicians, and researchers.



[www.challengingbehaviour.org.uk/what-we-do/national-strategy-group/](http://www.challengingbehaviour.org.uk/what-we-do/national-strategy-group/)



**It was a great day thanks so much for inviting me. The fact that families are so integrated is so meaningful and unique. I feel so welcome and at home**

**- Family Carer National Strategy Group Member**

Our aim is to ensure the system focusses on early intervention rather than crisis.



**The CBF promotes and highlights the need for an early intervention approach, to work with and invest in families as valued partners, and with full and meaningful co-production**

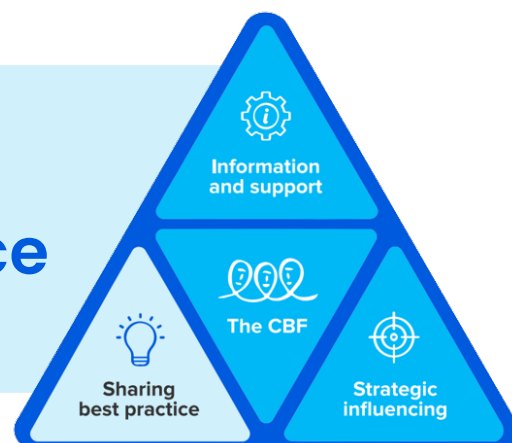
**- Professor Richard Hastings, Director of the Centre for Research in Intellectual and Developmental Disabilities, University of Warwick**

In partnership with others, we work to find ways to seek the views and input of children, young people and adults with the most complex needs and share and promote their engagement.

We have developed positive relationships with researchers to amplify the voice of families of individuals with severe learning disabilities in research, and we support families to input to national policy making and service development. Our work aims to push forward the agenda for better and timely local provision, with enhanced skills and training for families, support workers and paid carers.



## Objectives and activities Sharing best practice



**Sharing best practice is embedded in our strategic influencing work and our information and support.**

Best practice provides evidence that **it is entirely possible to deliver the right support in the right place at the right time.**

Sharing, modelling and actively promoting best practice on the ground runs through all our work. We do this through our family support casework and resources, strategic influencing work, and family carer and professional email networks, as well as through specific projects involving local authorities, government departments, and other partners.

We are investing additional capacity, using our reserves, to support, build on and deliver best practice learning from our project work. This has included co-production of new workshops (for example, ‘whole family approaches’ and ‘trauma awareness’) as well as working with local family carers and stakeholders in specific geographic areas to provide additional resource, capacity, and experience to empower and facilitate local families input at a strategic level.

### Public Benefit

In planning and reviewing the charity’s activities to meet these objectives, the Trustees have taken account of the Charity Commission’s guidance on public benefit. The CBF delivers public benefit by providing information and support to families and professionals caring for and supporting children, young people and adults with severe learning disabilities whose behaviour challenges. All our information and support is provided free of charge to family carers. We also work to improve the understanding of behaviours that challenge amongst professionals and the wider public, helping others to provide better support and services and more opportunities.



## Achievements and performance Information and Support



**Thank you, as always, for your invaluable help and support. It makes a huge difference to know we have this informed help and that you ‘have our backs’**

**– Family Carer**

Our family support service has responded to 2625 queries through our support line, email and website this year which is a 70% increase on the previous year. With the Triage Officer in place, this increase now shows a more accurate picture of all the enquiries received and responded to, including signposting and providing one-off information as well as family support and casework.

We had over 33k resources downloaded from our website, a 20% increase from last year. The large amount of information available on our website ensures that the families we support have 24-hour access to information around the key issues that impact on their lives. Our family carer review panel and professional volunteers help us to review and update our resources, to ensure they are current and helpful.



**2625**

Queries through our  
support line



**33,000+**

Resources downloaded  
from our website



Family carers who contact the CBF may need differing levels of support and information. They will initially be triaged. The triage role continues to be an efficient way of prioritising and signposting enquiries and access to specialist caseworker support. Family carers who contact the CBF may be offered a range of free resources which can be emailed or downloaded from the website. If required, these resources can be posted out as not all families will have access to the internet or a printer.



[www.challengingbehaviour.org.uk/information-and-guidance/](http://www.challengingbehaviour.org.uk/information-and-guidance/)

Some family carers will need to speak to an experienced family support team member about a specific issue or query which may take the form of one or two calls/emails.

Some family carers may have more complex situations and will require more ongoing casework support which can range from three calls/emails to ongoing support spanning months or years. This level of ongoing support reflects the complexity of the situations that families are managing for their relative which can include significant health issues, concerns over care and support, rights and the law, financial disputes around the funding of the support package, safeguarding, transition and being served 28 days' notice to leave current provision.

Families approaching us with these multiple complex issues often require intensive casework over a long period. The average period of support is six months with some families returning over many years for further support as new issues emerge.

### **Case Study**

P contacted the CBF when her son D was living in a children's home in another local authority. P was concerned about the support that D was receiving and wanted him to move closer to home. P felt that the funding authority were not listening to their concerns or request and the relationship between P and the professionals had broken down. The CBF have been providing support to P for three years, this has included support to:

- Request a move back to the local area
- request a mental capacity assessment and best interests decision
- request family visits at Christmas time (that were initially refused)
- facilitate family involvement at medical appointments via three way calls
- meet with an MDT to coproduce a PBS plan
- develop a working relationship between P and staff at a new school
- engage with Court of Protection process including meeting with P's solicitor
- raise a serious safeguarding concern including liaising with the Police

- maintain a working relationship between P and professionals
- respond to 28 days notice to leave from the current provider – ensuring a longer transition period
- consider a potential new care provider
- request a medication reduction plan

It was not possible to support P with these issues in isolation, one by one. As often happens for families of disabled children, young people and adults, one issue affected or was intertwined with another. This can be overwhelming and highly emotive for the families we support. The caseworker was able to devote time to understanding P's views, which built a trusting relationship, whilst picking apart complicated parts of the 'system' and helping P to understand them.

The Legal Panel of specialist legal experts representing all the leading law firms specialising in learning disability law, convened and chaired by the CBF, continues to provide valuable expertise and support on a voluntary basis. We continue to play a vital role in enabling and supporting families to be aware of, understand and navigate the legal framework and to access legal advice and support to take appropriate action. During the year we have referred a number of families to the panel. They received the specialist legal support required to take their issues forward or were given support specific to their circumstances. (See page 21 for further information about the strategic work of the Legal Panel)



**The CBF has been an invaluable support to my family for almost 3 years now. From when my son had to leave his school setting earlier than planned, they helped me to get a solicitor for unfair dismissal for discrimination. We won the case for that, and then also when he was held in an ATU they helped me constantly with supporting me to challenge the people in the ATU and the CCG. I will never forget their help and support which is still going on to this day as there is always something to challenge**

**– Family Carer**

# Peer support

We continue to support a range of initiatives that provide different types of peer support to meet the varying support needs of families who contact us.



[www.challengingbehaviour.org.uk/for-family-carers/peer-support/](http://www.challengingbehaviour.org.uk/for-family-carers/peer-support/)



**Without the CBF I would not have been able to understand my rights as a parent of a disabled adult. Being part of the Family Email Network, I feel very much part of a community who share the same problems and joys of looking after a disabled adult**

**– Family Carer**

This includes:

## Listening Ear Calls

We continue to support two committed family carers who offer listening ear calls to our families. These are opportunities for families to speak to people who understand and are non-judgmental. The feedback has been extremely positive.

## Email Networks

Our family carer email network now has around 500 members and continues to be regularly used. This forum continues to enable families to ask one another questions, share solutions and seek support around issues impacting their daily life, support package or relative's behaviour that might be described as challenging. Families can also ask our Professional Panel questions via our professional email network, a network of over 1400 practitioners from across the health, education and social care sectors who also use this forum to share information, learning and asking their peers questions to support their work and disseminate good practice.

## **Carers Catch Ups**

During the pandemic, we started online carer catch up group meetings. These are led by a volunteer CBF Local Champion and provide an opportunity for family carers to meet online to share experience and support their wellbeing as we know that the majority of families who contact us describe feelings of isolation. Now that the pandemic has passed, we continue to facilitate these groups and working with families and plan to develop some themed carers catch up meetings. This year we have extended our catch-up meetings to carers catch up plus and piloted wellbeing activities within the groups. We are reviewing feedback and consulting families about what they find helpful and useful.



**I always look forward to Carers' Catch Up which is valuable for me as I share my problems and joys with other families around the country via Zoom**

**– Family Carer**

## **The CBF Family Forum (closed Facebook group)**

This forum continues to enable family carers to support each other in 'real time'. Currently the group has around 350 members and is limited to individuals with a relative with severe learning disabilities to ensure that the group is an understanding and empathetic forum. The group is monitored for safeguarding concerns by volunteer family carer local champions supported by CBF staff.



**I'm lost for words!! This looks just like what I'm looking for! I can't thank you enough**

**– Family Carer**

## **Helpline Collaboration**

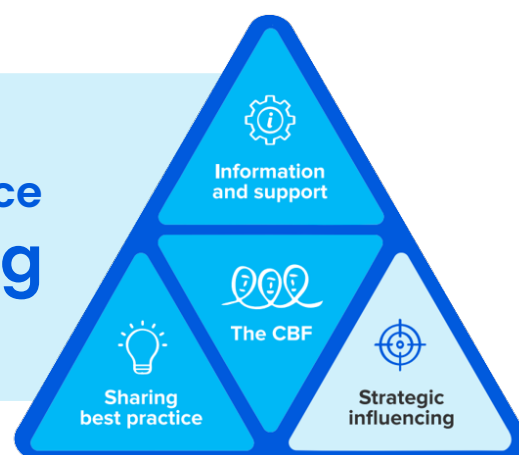
The CBF, in response to our understanding that families often get passed to several helplines and charities before they find the right one for them, continues to convene and facilitate a Helpline Collaboration. This year membership has increased and now includes Mencap, the National Autistic Society, Contact, Cerebra, Unique and Mencap Cymru. Meetings happen once a month via Teams, and we share information about each of our services, identify common issues coming to us from families and provide peer support to each other, which is especially appreciated by those who attend.



I find the Helpline Collaboration Meetings very useful. It is great to be able to share good practice with other organisations and to find out what everyone else does on a day-to-day basis – which in turn, makes it easier to signpost families to specific organisations for specific issues. **– Group Member**



## Achievements and performance Strategic Influencing



As a small organisation we can achieve much more by specifically informing and encouraging individuals and organisations in positions of power and influence to raise their understanding and awareness of the issues individuals and families face, and to influence their activity. We aim to promote collaboration to drive progress. The three strands of our work are inextricably linked and closely aligned. In practice our family carer experiences steer our influencing work. We continue to raise concerns and challenges to a range of senior individuals and organisations both at a local and national level where individuals' human rights are being breached. Our strategic work is wide-ranging and varied and aims to influence all parts of the complex system which is meant to be working in a coordinated way to deliver good outcomes to children, young people and adults and their families.

## Challenging Behaviour National Strategy Group (CB-NSG)

We remain very grateful to the Esmée Fairbairn Foundation for their continued support and funding towards the National Strategy Group and its work. The CB-NSG includes representatives from professional bodies, networks, charities, and the government alongside family carers, people with learning disabilities and researchers. It is based on the principle that if all the individuals and organisations who have a role to play in supporting this group work together in a coherent and coordinated way it will deliver better outcomes.



[www.challengingbehaviour.org.uk/what-we-do/national-strategy-group](http://www.challengingbehaviour.org.uk/what-we-do/national-strategy-group)



**Great day today, thank you to you and the whole team, it takes a lot to bring everyone together and it's so useful**

**– National Strategy Group Member**

There are currently over 90 core CB-NSG members who have significant knowledge and expertise, and a senior level role in supporting and delivering services to people with learning disabilities, and over 600 associate members who commit to working following the values and principles of the co-produced Challenging Behaviour Charter.

### **Campaigns Sub-group (including Campaign Families)**

CB-NSG members continue to meet regularly to share information about policy and practice and agree campaigning priorities, including aligning with, and supporting activities by other individuals and organisations.

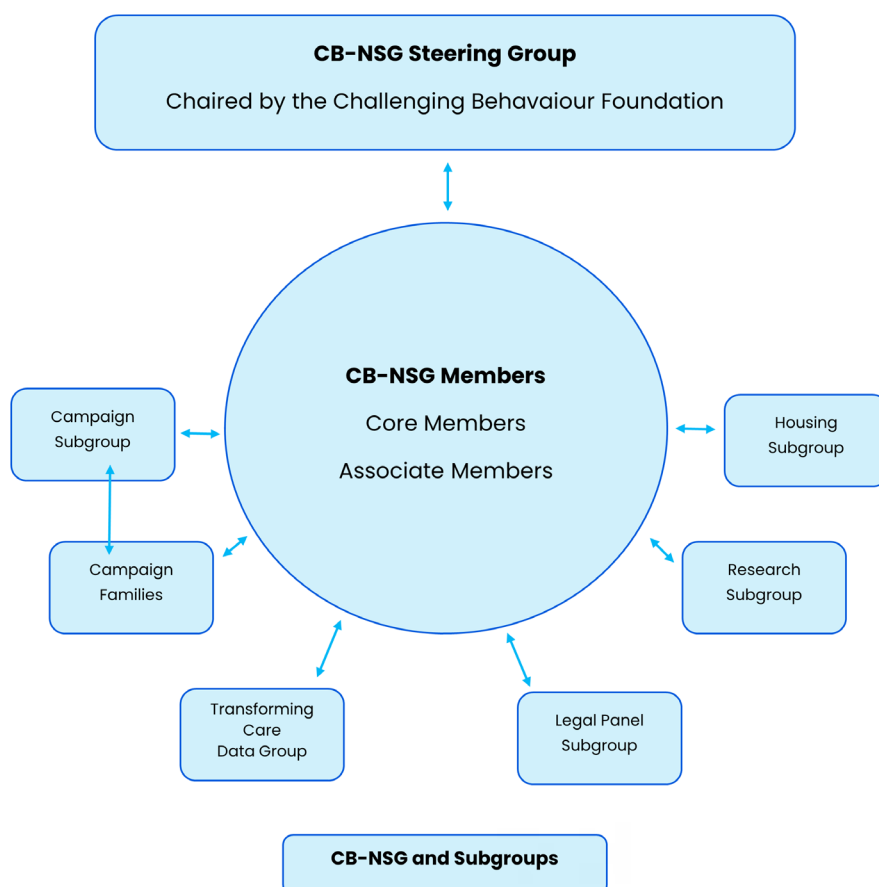
Over the past year the Campaign Families group have taken part in a range of influencing activities:

- Provided input to multiple consultations including the Mental Health Act Consultation
- Responded to the 'Building the Right Support' Action Plan
- Participated in the All-Party Parliamentary Group Meetings
- Agree campaigning priorities for the coming year

### **Legal Panel Sub-group**

We continue to maintain our established legal panel consisting of specialist lawyers and barristers who provide pro-bono information and support to families who contact our family support service. The aim is to ensure free initial access to timely specialist legal advice with the CBF supporting the family through this process. This year, we continued to take forward the strategic legal work identified by our legal panel and built on our collaborative working relationship with key experts in the legal field. Highlights include:

- Continuing to provide legal advice to families referred to and supported through our family support team
- Planning and contributing to a wider legal strategy meeting with families, advocacy organisations and providers to identify key issues, share resources and co-ordinate activity
- Continuing to take an interest in legal opportunities to challenge the failure of the 'Transforming Care' programme and to work with other organisations who share our concerns. We have met with the Equalities and Human Rights Commission to consider legal options





The legal panel members continue to work together to consider and address key areas of legal challenge both related to the inequalities for people with learning disabilities which have arisen as a result of the cost of living crisis and the ongoing inequalities due to failures in Transforming Care.

### **Positive Behaviour Support/Research Sub-group**

This group will link together some key research initiatives with CB-NSG member involvement including the PBS academy, Sharland Foundation Development Disabilities ABA Research and Impact Network (SF-DDARIN) and the Tizard Centre. New co-chairs have been appointed, an academic and a family carer, and the group will be developed in the coming year.

### **Data Sub-group**

The group has continued to focus on analysing and using the data published by NHS England and the Care Quality Commission (CQC), particularly regarding unit characteristics, a regional breakdown of patients currently receiving inpatient care who do not need it according to their care plan, along with further details about individuals working towards discharge.

The data group has continued to highlight the need for improved data collection across children, young people and adults with NHS Digital around the Assuring Transformation and Mental Health Services Data Sets and feeding into various consultations including the SEND Green paper review.

## **Other strategic influencing**

### **Protecting Rights Eliminating Restraint Group (PRER)**

Formally known as the Reducing Restrictive Interventions and Safeguarding Children (RRISC) group, members have agreed to change the name to better reflect the approach from reducing (which could be by a relatively small amount) to eliminating inappropriate restraint. This group focusses on children and takes a UK-wide approach with members from all four nations. The group has continued to meet twice a year sharing progress and initiatives to drive change across the UK.

### **The External Support Group**

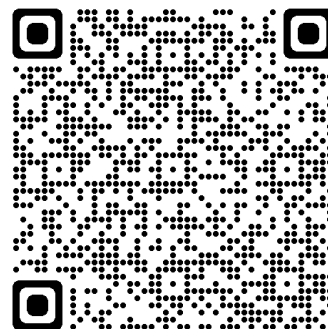
The External Support Group (ESG) brings together a number of individuals with significant practical experience in supporting people with complex needs in community settings, including developing individualised packages of support and maintaining that support to provide good outcomes for individuals. Areas of expertise in the group include experience in clinical/medical practice, commissioning, inspection and regulation, research and evidence, advocacy, the third sector and family support. An animation showing the work of the ESG has been co-produced to explain the approach on a dedicated webpage on the CBF site.



[www.challengingbehaviour.org.uk/what-we-do/projects-and-research/  
support-and-services/the-external-support-group-esg/](http://www.challengingbehaviour.org.uk/what-we-do/projects-and-research/support-and-services/the-external-support-group-esg/)

## STOMP/STAMP

The STOMP (Stopping Over-Medication of People with a Learning Disability, Autism or Both) STAMP (Supporting Treatment and Appropriate Medication in Paediatrics) programmes are initiatives within NHS England to try to address the issues around medication. There has been a renewed NHS England focus on the STOMP/STAMP work, and we have been commissioned to work with their team to gather the views of family carers on what is needed and what would help to progress this work.



<https://www.challengingbehaviour.org.uk/what-we-do/projects-and-research/changing-poor-practice/medication/>

We supported family carers to input to the National Children's safeguarding enquiry into abuse at 52-week schools run by the Hesley Group. The review led by Dame Christine Lenehan was in two phases. We supported family carers to input to the work and review the recommendations arising from it. We will continue to work to monitor and promote implementation of the recommendations.



<https://www.gov.uk/government/publications/safeguarding-children-with-disabilities-in-residential-settings>



**The views of parents have significantly influenced the development of the Report and I am really pleased that the panel have used a lot of the information and insight from the Challenging Behaviour Foundation**

**- Dame Christine Lenehan, Director National; Children's Bureau**



## Achievements and performance Sharing best practice



The principle of sharing and actively promoting best practice runs through all aspects of our work. We share and promote best practice through our family support work, including casework and resources, and our national influencing work. This includes disseminating information via the CB-NSG, its core and associate members, our family carer and professional email networks as well as our extensive networks. We are invited by researchers to contribute to a range of projects which vary from recruiting members to advisory or reference groups to leading Public and Patient Involvement (PPI) facilitating focus groups with family carers to ensure their input to the research and its dissemination and supporting recruitment to trials.

### Workshops

All our workshops have been co-designed with families on topics where they have identified gaps in knowledge and understanding. The workshops are co-produced and are co-delivered with family carers, modelling the partnership working approach we promote.

This year we have extended our range of workshops to include Trauma Awareness, PICA behaviour and Whole Family Approaches, alongside our existing Positive Behaviour Support and Communication workshops. We continue to recruit, train and support co-facilitators with in-built evaluation and quality monitoring procedures.

Building on previous work to raise awareness of the trauma experienced by family carers in their interaction with 'the system' in trying to get support for their family members, we have developed new materials to deliver a longer and more in-depth workshop. This was because of feedback from the initial pilot and the wishes of the families involved in making the films. The workshops need to convey the voices and consistent messages of the families, be co-facilitated with a family carer and provide awareness of the issues. We invest in robust recruitment and providing additional support to family carers delivering the workshops to ensure they are not further traumatised by the sensitive and difficult content.



**Thank you, I really enjoyed it and would highly recommend it.  
The co-trainers are fantastic**

**– Family Carer**

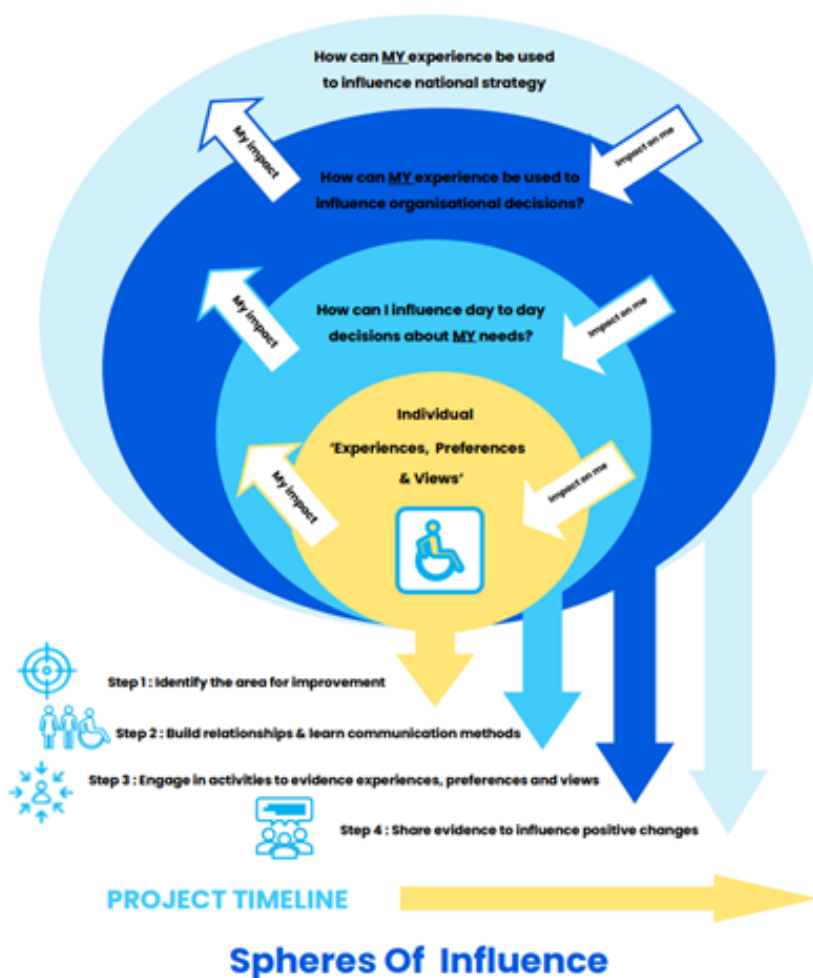
“ I liked the chance to meet other people in the same shoes and share experiences

– Family Carer

## Direct Engagement – hearing the views and experiences of children and young people with learning disabilities and complex communication challenges

### What Matters to Me :

influencing policy with the experiences, preferences and views of young people with severe or profound and multiple learning disabilities



Building on our successful ‘Seldom Heard Voices’ project (report provided to NHS England but not published) and in recognition of the need to get better at seeking the views of children, young people and adults with learning disabilities and more complex communication challenges, we have started a three year project funded by The Blagrave Foundation and Children in Need to work with children, young people and those who know them well to gather their views about policies that affect their everyday lives. This project is called ‘What Matters to Me’ and will build on previous work by CBF, the Tizard Centre and others with the aim of producing an accessible youth manifesto in year 3.



[www.challengingbehaviour.org.uk/what-we-do/projects-and-research/valuing-individuals-and-their-families/what-matters-to-me-project/](http://www.challengingbehaviour.org.uk/what-we-do/projects-and-research/valuing-individuals-and-their-families/what-matters-to-me-project/)

## Advocacy

There are two areas of work around advocacy: A national review which CBF has provided input to and regional work in two areas.

### National work

The CBF has been a member of a steering group for a national review of advocacy support provided to people with learning disabilities and/or autistic people. CBF has also been commissioned to gather the views of family carers both in their role as advocates and their views about advocacy support provided to their adult relative. Other organisations on the steering group have collected input from other stakeholders and all the individual reports have been collated into a national report which was due to be published in March 2022. The revised date for publication has been set for March 2023 – at the time of writing this report the report remains unpublished with no new date set.

### Regional work

The CBF partnered with organisations in two local areas to identify family carers experiences of advocacy and of advocating for their relative and what would be helpful to support them in this role. A comprehensive, co-produced resource is being developed and will be available for family carers online and in print.

## Getting It Right Project

We are coming to the end of a three-year project funded by The National Lottery Community Fund building on our previous work and experience of local area and national strategic work. In year one we worked with West Sussex, year two with the Black Country and year three with Camden. We are currently awaiting the final evaluation of the project and will take forward the findings.



[www.challengingbehaviour.org.uk/what-we-do/projects-and-research/support-and-services/getting-it-right/](http://www.challengingbehaviour.org.uk/what-we-do/projects-and-research/support-and-services/getting-it-right/)

## **Keyworker Project**

The CBF continued to work with Black Country Transforming Care Partnership (TCP) to enable development of a peer support model as part of their Key Working for Children and Young People pilot. This pilot is one of a number funded by NHSE across the country. The CBF and the Council for Disabled Children called for keyworkers in the publications Paving the Way and the Lenehan review, based on the findings of our joint Early Intervention Project.

The aim of the pilot is to employ key workers from a range of backgrounds. These key workers will work as a team supporting each other to provide flexible and timely input to children and young people, families and carers across the Black Country, dependent upon the demand identified through the Black Country dynamic risk register. The CBF and Dudley Voices for Choice worked together to establish peer support for families once they step down from keyworker support.

## **Input to Research Projects**

In line with our aim of sharing family lived experiences and building evidence to inform our strategic influencing work, we have continued to support and shape a variety of research applications and funded projects with a wide range of academics and researchers. We have continued to provide input to steering and advisory groups and supported paid family carer participation in consultations and focus groups, including translating research findings into practice.

We continue to encourage and support families to contribute to consultations and calls for evidence so that their experience and views are heard and included in any response that the CBF submits. We have responded to a range of consultations/calls for evidence with input from families to highlight the issues for children, young people and adults with severe learning disabilities whose behaviour challenges and their families.



[www.challengingbehaviour.org.uk/what-we-do/strategic-influencing/consultations/](https://www.challengingbehaviour.org.uk/what-we-do/strategic-influencing/consultations/)

## **MindEd**

We continue to support the development of resources for this free online educational resource focussed on mental health, by supporting family carers as co-authors of materials relating to issues of importance to people with learning disabilities and their families. For this year, resources for the STOMP/STAMP programme have been developed.

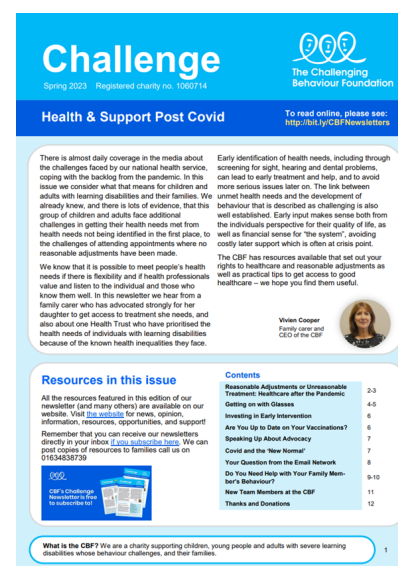


### Newsletter



We produced an electronic and printed newsletter on the topic of 'Health and Support Post Covid' which was sent out to around 3000 people in hard copy to ensure families throughout the UK without digital access were not left out.

We will continue to seek funding and partnership opportunities for hard copies of our newsletter to be sent out in the future.



<https://www.challengingbehaviour.org.uk/news/challenge-newsletter-spring-2023-health-support-post-covid/>

### Social Media

We continue to use our social media platforms to share good practice information and practical resources. All our social media platforms have seen an increase in followers this year allowing us to reach more people.

## Looking back over the year

This year has seen a combination of continuation of ongoing work and support as well as new projects, all encompassed within our three core strands of work – and all with lived experience and co-production at the core.

As a small team with limited resources, we have to work efficiently, flexibly and effectively, ensuring that we always focus on outcomes and impact. We have many years of experience that inform all our activities and approach.

We know that the change we want to see for everyone will not happen quickly – and that it will only be achieved by persistence and working collaboratively. We will continue to champion and independently advocate for the rights of individuals and their families to be upheld, and for investment in early intervention and community support and services to ensure the system delivers what it needs to – **the right support in the right place at the right time.**

# Financial Review

## Financial position

Incoming resources for the year amounted to £530,447 (£610,424 in 2021/22) and resources expended were £522,982 (£516,484 in 2021/22), giving net income of £7,465 (£93,940 in 2021/22). The reduction in income is due to a fall in earnings from consultancy and other paid-for services, which amounted to £138,652, compared with £222,284 the previous year. These are ad hoc activities which inevitably fluctuate from year to year. The lower net income for 2022/23 also reflects the tightening of the external financial situation, with increasing pressure on costs and competition for funding, although grant income remained consistent with 2021/22.

The support of trusts and foundations remains vital in enabling us to remain independent and carry out work to increase the CBF's impact while helping to maintain its financial viability. We would like to extend our grateful thanks to all supporters who have enabled us to achieve this. The receipt of a three-year grant from the National Lottery Community Fund has enabled us to raise awareness of our evidence-based approach much more effectively. We wish to thank the Esmée Fairbairn Foundation, the John Ellerman Trust and the Blagrave Trust for supporting our policy and influencing work, and the Colyer-Fergusson Charitable Trust for helping to fund our family support service. Thanks are also due to the Pears Family Charitable Foundation and several smaller foundations for supporting core costs.

Looking ahead, there is no doubt that the funding environment is becoming more challenging than ever. Most paid work is ad hoc, unpredictable and fluctuates in volume, while grant funding is one-off or relatively short term and subject to fierce competition. Several multi-year grants have recently ended and are proving difficult to replace. In the light of this, the Trustees recognise the critical importance of scrutinising regular forward projections, reviewing closely the financial performance of individual projects and identifying pre-emptively any funding gaps and the actions needed to address them.

## Reserves policy

The Trustees have reviewed the key risks across the organisation and have set a target of holding closure costs plus six months running costs in free reserves (unrestricted funds) to ensure the charity is in a stable position to:

- 1.** Fulfil notice periods, statutory redundancy and meet all other obligations and liabilities in event of closure of the charity.
- 2.** Provide effective staffing to seek alternative funding and support the development of alternative forms of support for families in need of long-term casework in the event of a downturn in income or closure (we typically provide casework support to families for a period of six months to three years).
- 3.** Enable the organisation to respond to unforeseen external challenges such as an increase in demand similar to that experienced during the COVID-19 pandemic.
- 4.** Provide a level of flexibility to respond to any opportunities that may arise at short notice to influence national policy on behalf of our beneficiaries. In taking any decision to use reserves in this manner the Trustees take account of the CBF's charities financial position ensuring that any risks do not impact on its sustainability.

In determining the reserves strategy, the Trustees have taken a holistic and strategic approach, considering carefully the reasons for maintaining reserves as well as the logistics of utilising them. This includes consideration of the external factors that may affect reserves such as demands on capacity and the high competition for and relatively short-term nature of grant funding, which forms a large part of the charity's income, and often involves a long lead time to secure.

Free reserves amounted to £450,522 at 31 January 2023, representing approximately six months of running costs, after taking account of estimated closure costs, based on predicted expenditure for 2023/24. We anticipate that reserves will reduce during the next financial year in the light of the difficult financial outlook, unless we are able to secure funding in excess of the level anticipated in our 2023/24 budget.

## Our plans for the coming year

We plan to recruit 1 new intern in the coming year. We will also invest in a new post to take forward our co-production and engagement work under the sharing best practice stream. This new role will be piloted for a year and funded from our current reserves. Our core aim of making society inclusive and the statutory support systems work effectively for children, young people and adults with severe learning disabilities whose behaviour challenges and their families remains and shapes all our work and plans.

Our ultimate aim as an organisation is not to be needed because the ‘system’ works, although we know this is a long-term aim and in the interim, we need to sustain our work. If and when more capacity is required, we intend to utilise consultants who have been through our core training, to enable flexibility without long-term financial commitment, unless there are new opportunities for funding fixed term posts which arise for project work we want to take forward.

We continue to see funding challenges emerge as the pandemic costs are repaid and the impact of the cost of living crisis on our organisation, the families we support and the wider community is felt. Trustees are mindful of potential future financial risks and plan accordingly, including close financial monitoring.

Our core aim remains to ensure that “the system” and society enable individuals with severe learning disabilities, and their families, to receive the right support in the right place at the right time. Our approach, and all our work is carefully planned and thought through with regular reviews to consider outcomes and impact, and in the coming year we will continue to focus on our three key interconnected areas of work. Our many years of experience have informed and refined our work and how it is delivered to achieve impact and good outcomes. The change we want to see is significant and takes time. Although we are acutely aware of the urgency and are ambitious and impatient for change, we are realistic regarding our capacity, the inertia and resistance to change within the system, and the need and investment required to work collaboratively.



## Future plans

# Information and Support



We plan to continue to ensure our specialist family support and information service is maintained, continues to be family centred, and provides high quality independent expertise and advocacy for families in need. The families we support are often in very complex situations, navigating through disjointed education, health and care systems, and experiencing marginalisation, “parent blame” and exclusion often simultaneously. Families clearly describe “the fight” for the support and services their relatives need, and their experiences of discrimination and basic human rights being ignored.

Funds generously provided by Pears Foundation, the Garfield Weston Foundation, Colyer Fergusson Charitable Trust and The Steele Charitable Trust for our family support helpline and casework are vital to enable this work to continue. As some multi-year funding ends, we will continue to prioritise seeking further funding to ensure we can maintain and develop the support and information we provide for families who are often in crisis.

We will continue our peer support Facebook group to offer families the option of different forms of peer interaction and communications. This will run alongside the existing ‘Family Carer Email Network’ to cater for the differently technologically-suited groups of families who benefit from having access to online interaction and peer support. In addition, we will continue to offer a telephone “listening ear” service to provide trained and supported peer support to those who cannot access or prefer not to use our online support networks.

Due to reduced capacity in the team this year, we have not been able to take forward our review of the diversity of the families who use the CBF’s information and support service and work to increase inclusion for a broad range of families, particularly those from ‘hard to reach’ communities. We aim to carry out this review in the coming 18 months. We will continue to send paper newsletters (subject to identifying funding) and information resources to families who do not use the internet or who request hard copies of resources.

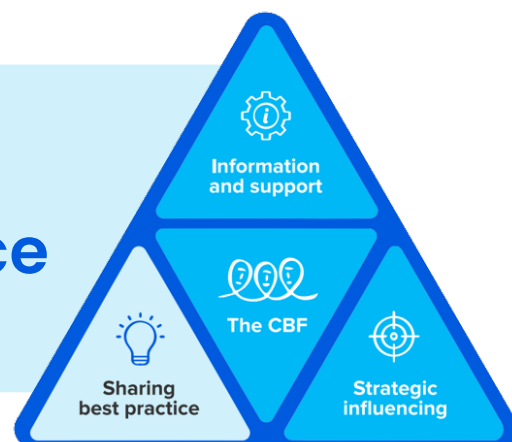
We plan to scope out producing podcasts with a mix of family carers and professionals on a range of topics which will provide a new way to share information in an informal and engaging way.

We will be producing new resources for older family carers along with an updated and comprehensive advocacy guide.

Our family support and information service takes a lifelong approach and we will consider how we target families in particular situations to increase our impact and as part of that, we will review how we record information to enable us to collect and analyse data.



## Future plans Sharing best practice

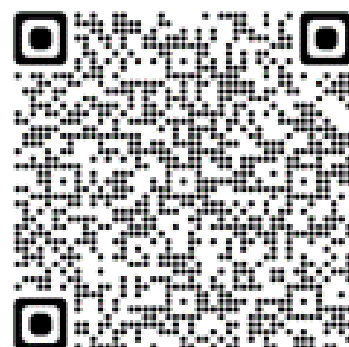


Using our unrestricted reserves, we will invest in piloting a new role leading this strand of our work. We will use this pilot role to test opportunities that have emerged from our project work demonstrating the delivery of a tested and locally sustained model. It will focus on good outcomes that properly engage local families as valued expert partners at a strategic and grass roots level.

An example of our work moving from a strategic influencing project to local implementation is the Getting it Right Project which initially targeted three local areas, each with intensive and specialist input for one year. This year we will take forward further work with one of these areas to help deliver the actions identified in the project and employing and supporting a local family carer to deliver and embed this work and sustain the momentum. Likewise, our input to a Keyworker Pilot has resulted in further work to sustain peer support and evaluate the impact.

Co-production is a key principle of all the work of CBF and will continue to be so. To help promote this approach and measure its impact, we will work with families to develop a resource outlining what family carers expect from co-production. We will use this resource as a measure of our own performance and the underpinning principles of working with partners.

Promotion of early intervention approaches, both in terms of support in early childhood as well as early support with emerging behaviours that challenge, will remain a key feature in all three strands of our work. We will continue to collate and present evidence of the positive benefits of early intervention, and work with researchers and academics to achieve this. We plan to work with researchers to utilise our Early Intervention report published with partners in 2022 and to continue to promote investment in families and availability of timely specialist support.



[www.challengingbehaviour.org.uk/news/new-report-launched-investing-in-early-intervention/](http://www.challengingbehaviour.org.uk/news/new-report-launched-investing-in-early-intervention/)



The views and experiences of children and adults with severe learning disabilities are often disregarded as they are unable to attend or use traditional methods such as focus groups or surveys – but it is important that we adapt our approach to enable their views to be captured. We will therefore continue to develop our work on engagement with children, young people and adults with complex needs, working with other leaders in this field, to find innovative ways to seek their views, and to demonstrate that it is possible to consult with them in a meaningful way. At the same time, we will take every opportunity, in our own work and the work of other organisations, to ensure that families of children, young people and adults with complex needs can share their lived experience to drive forward change. We will be completing the scoping phase of the ‘What Matters To Me’ project, identifying two project partners to work with and beginning the active engagement with the young people.



[www.challengingbehaviour.org.uk/what-we-do/projects-and-research/  
valuing-individuals-and-their-families/what-matters-to-me-project/](http://www.challengingbehaviour.org.uk/what-we-do/projects-and-research/valuing-individuals-and-their-families/what-matters-to-me-project/)

Our PBS workshops for family carers and professionals supporting children and adults with learning disabilities are well established with positive feedback, and we will promote them to increase delivery this year. We will work with researchers to apply for funding for further formal evaluation of our PBS workshops, and other research initiatives will be pursued, both with academic partners and through our CBF/ Tizard Family Carer research group, to further build the evidence base. In partnership with a range of other individuals and organisations we will work to develop a national learning disability research strategy.

We will build on our newly developed and piloted ‘Whole Family Approaches’ and PICA (eating inedible objects) workshops and will promote these with a range of stakeholders including family carers and the Health and Social Care Workforce.

Family experiences of trauma will continue to be an important area of work for the CBF. Funding secured from Skills for Care has been used to refine and pilot our co-produced Trauma Awareness Workshop. Feedback from participants has been extremely positive as the resource shares the authentic and direct views and experiences of families. With our newly recruited and supported co-trainers, we will promote and disseminate these to a wide range of professionals who have a role to play in supporting families. Additionally, we have been approached to write a book chapter which describes how the resource was co-produced and the issues the families have highlighted. We are also working with the Tizard Centre and KMTV to produce a short 12-minute documentary film which will be widely available and help with awareness raising and dissemination of the key messages from families about the trauma the system creates.

Building on our national and regional advocacy work, we will continue to promote the need for accessible, robust and independent advocacy for individuals and families, and to raise awareness of the advocacy role that families fulfil. We will finalise and disseminate the online advocacy resource.

We will work with SF-DDARIN to make research findings more accessible for family carers through support for our Intern programme.



## Future plans Strategic Influencing



We are ever mindful that we operate in the wider context of the learning disability, carer, social care, education, health and voluntary sectors. Developing and maintaining relationships with others with similar related aims to the CBF will increase our collective impact and our collaborative, solution-focused, and evidence-based approach will continue. Working collaboratively takes longer and requires skilled management to build trust and focus on shared aims and objectives rather than differences of opinion, but we believe we can achieve more by working together and, by using this co-production approach, can deliver better outcomes.

Our influencing agenda will of course continue to be responsive to the changing political circumstances and challenges that arise. Constant reorganisations and changes in education, care and health systems and key post holders continue to pose challenges through lack of continuity, delays, and inertia. We remain committed to continuing to challenge the failure of the Transforming Care agenda. We have long called for a cross Government approach, which was initially rejected but now adopted, and we will continue to monitor whether this results in any action that makes a difference and keeps this on the national and local agenda. This work has the potential for a very significant impact for our client group and specific multi-year funding support to pursue this work to enable this vital long-term work to progress will be prioritised. There is no “quick fix” solution – it requires strategic patience, commitment and determination.

We will continue to bring together a diverse range of stakeholders, through our CB-NSG members and associates, and work in partnership to identify ways to drive forward the change needed, developing workable initiatives that build on experience and existing knowledge, and delivering a solution-focused approach. We will arrange a workshop at a CB-NSG meeting to bring together people involved in each of the three Getting It Right (GIR) sites, to share learning and outcomes and identify potential opportunities to work together to build on the GIR action plans and their legacy.

We will build on, and expand the External Support Group (ESG), a CBF led initiative, bringing together a group of senior experienced clinicians and professionals to provide support to local teams who are supporting individuals. Over the last year, the ESG has had meetings with senior Department of Health and Social Care and NHS England officials to describe the approach and how it could be utilised to support the transformation of care. As a result, the group has been approached by a Trust who have commissioned support for one individual they needed additional specialist help with. The aim is that through working with this individual, their family and the team around them, learning will be shared with the local team who will be better equipped to support other local individuals overseen by ESG members, reflecting our ‘doing with not doing for’ approach.

Our work targeting professionals who work with families, increasing their awareness of need and the issues families face, will continue. We are planning to continue the strategic legal work identified by our legal panel members and the individuals and organisations who have participated in our legal strategy meetings so far. Promoting a joined-up approach to enable easier and timely access for families to legal support and information, and to ensure best use of limited resources will be ongoing. This work, linked to the CBF Legal Panel work may require seeking additional specialist capacity to drive this forward.

The Legal Panel members identified a need to develop a resource for individuals (and their families and advocates) who are in inpatient settings with “delayed discharge” due to the community support not being available. This resource will explain the specialist legal support they can access to help resolve this. The Legal Panel will develop this resource and work with CBF, other charities, advocacy groups and others to share and publicise it. We will liaise with NHS England and the DHSC to identify opportunities to promote and share the resource through their system processes.

Our work on reducing the use of restrictive interventions will continue, via the PRER (Protecting Rights Eliminating Restraint) group, and other initiatives such as the NHS England STOMP and STAMP programmes, which aim to address the inappropriate medication of individuals with learning disabilities. The PRER group updated its name from RRISC (Reducing Restrictive Interventions and Safeguarding Children) to ensure it reflects the group’s goal to eliminate inappropriate restrictive practices.

## **Joined up working**

In the coming year we will continue to progress our work in all three key areas, regularly reviewing our activities and their impact. As a small team with limited capacity and resources, we are ever mindful of the need to target our efforts carefully and influence those in positions of power who can make change happen, and who have a wider reach and more resources. Our work is wide-ranging because it reflects the multiple issues and systems that families have to negotiate and contend with, and we know that there are many areas of work that need to be taken forward concurrently. All elements of our work and projects are interconnected, we work proactively but are also able to respond quickly to opportunities and needs as they arise. This is evidenced in our response to the pandemic: and having sufficient reserves is a key enabler in this respect. We know there will be significant challenges ahead – both in terms of the needs of the families we support, and the financial challenges we will face as a small charity to secure funds for our work. We will take all the necessary steps we can to ensure we are able to continue our much-needed work, making a difference to the lives of children, young people and adults with severe learning disabilities whose behaviour challenges, and their families.

# Structure, governance and management

## Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes a limited company, limited by guarantee, as defined by the Companies Act 2006.

## Recruitment and appointment of new Trustees

Trustee skills are reviewed annually to ensure the board has the range of skills and experience required. Any gaps in specific skills are identified and addressed through training or pro bono consultancy input or through the recruitment of new members to the Trustee Board. This year, we have appointed two new Trustees through this process.

We are currently reviewing how our network of Trustee Advisors are supported, involved, and contribute to the CBF and will implement new arrangements following the review.

## Organisational structure

The Trustees, who are directors for the purpose of company law and Trustees for the purpose of charity law, who served during the year and up to the date of this report are set out on the following page. Members of the charitable company guarantee to contribute an amount not exceeding £10 to the assets of the charitable company in the event of winding up.

Day-to-day management of the charity's activities is delegated by the Trustees to the Chief Executive Officer. The Trustee Board meets quarterly to review achievements and performance, finances, and future plans.

## Risk management

The Trustees have a duty to identify and review the risks to which the charity is exposed, including ensuring appropriate controls are in place to provide reasonable assurance against fraud and error.

The Trustees have put in place a risk management strategy, comprising an annual review of the risks the charity may face, the establishment of systems and procedures to mitigate risks identified, and the implementation of procedures designed to minimise any potential impact on the charity should any of these risks materialise. The work has identified as major risks a significant reduction in funding, together with the loss of key staff members, particularly due to inflationary pressures on salary levels, reflecting the difficult financial and staffing environment resulting from the COVID-19 and cost of living crisis. The regular updating and review of financial projections and tight budget management are key elements in the management of these risks. Attention has also been focused on non-financial area such as reputational risk and suitable mitigating actions put in place, while the pandemic has highlighted the importance of ensuring that the CBF is able to respond to national or international-scale incidents that lie beyond our control.

# Reference and administrative details

## Registered Company number

3307407 (England and Wales)

## Registered Charity number

1060714

## Registered Office

c/o The Old Courthouse  
New Road Avenue Chatham  
Kent  
ME4 6BE

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## Trustees

Dr D Allen (Appointed July 2022)

Ms S Cooper

Mrs V A Cooper (Resigned July 2022)

Mr J Dodd

Ms A K Giles (Resigned October 2022)

Dr N J Gore

Ms D E Lightfoot (Chair)

Mrs C Million

Mr A Rook (Appointed July 2022)

## Company Secretary

Mrs C Million

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## Auditors

Xeinadin Audit Ltd  
Becket House  
36 Old Jewry  
London  
EC2R 8DD

# Statement of Trustees' Responsibilities

The trustees (who are also the directors of The Challenging Behaviour Foundation for the purposes of company law) are responsible for preparing the Report of the Trustees and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing those financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charitable company and to enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the trustees are aware:

- There is no relevant audit information of which the charitable company's auditors are unaware; and
- the trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information, prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

## AUDITORS

The auditors, Xeinadin Audit Ltd (via Calcutt Matthews Ltd), will be proposed at the forthcoming Annual General Meeting.

Approved by the order of the board of trustees on

and signed on its behalf by:

.....

Mrs C MILLION – Trustee/Company Secretary

# **Report of the independent auditors**

## **to the members of The Challenging Behaviour Foundation**

### **Opinion**

We have audited the financial statements of The Challenging Behaviour Foundation (the ‘charitable company’) for the year ended 31 January 2023 which comprise the Statement of Financial Activities, the Balance Sheet, the Cash Flow Statement and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company’s affairs as at 31 January 2023 and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

### **Basis for our opinion**

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditors’ responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC’s Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.



## Conclusions related to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charitable company's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

## Other information

The trustees are responsible for the other information. The other information comprises the information included in the Annual Report, other than the financial statements and our Report of the Independent Auditors thereon.

Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether this gives rise to a material misstatement in the financial statements themselves. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

## Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the Report of the Trustees for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the Report of the Trustees has been prepared in accordance with applicable legal requirements.

## Matters on which we are required to report by exception

In light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the Report of the Trustees.

We have nothing to report in respect of the following matters where the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit.

### Responsibilities of trustees

As explained more fully in the Statement of Trustees' Responsibilities, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

### Our responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue a Report of the Independent Auditors that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

Our objectives in performing the audit are to identify and assess the risk of material misstatement in the financial statements due to fraud or error and to obtain sufficient audit evidence to support this. We also evaluate and respond to the risk of material misstatements.

Audit procedures performed by the engagement team included:

- Gaining an extensive knowledge entity and environment
- Obtaining a sufficient understanding of the internal environment, including control systems in place for the detection and prevention of fraud.
- Evaluating said systems to determine whether they are operating to a satisfactory level and are providing the right level of control and authorisation within the entity.
- Understanding the entity's current activities, assets and liabilities and comparing these to the entity's charitable objectives and aims.
- Discussions with management and those charged with governance as to any known or suspected instances of noncompliance with laws and regulations, including fraud.
- Reading minutes of meetings of those charged with governance and comparing these to what is reflected in the statutory accounts.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of our Report of the Independent Auditors.

## **Use of our report**

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditors' report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

.....

Nicholas Hume FCA (Senior Statutory Auditor)  
for and on behalf of Xeinaidin Audit Ltd  
Becket House  
36 Old Jewry  
London  
EC2R 8DD

Date: .....

# Statement of Financial Activities

## for the Year Ended 31 January 2023

	Notes	Unrestricted funds £	Restricted funds £	31.1.23 Total funds £	31.1.22 Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>					
Donations and legacies	2	21,583	-	21,583	26,694
<b>Charitable activities</b>	5				
Information and Support		81,542	101,508	183,050	202,700
National Influencing		16,500	218,874	235,374	171,291
Core Funding		88,911	-	88,911	207,455
Other trading activities	3	673	-	673	2,138
Investment income	4	656	-	656	146
<b>Total</b>		210,064	320,382	530,446	610,424
<b>EXPENDITURE ON</b>					
Raising funds	6	21,140	-	21,140	19,587
<b>Charitable activities</b>	7				
Information and Support		65,638	127,643	193,281	167,365
National Influencing		687	186,007	186,694	153,886
Core Funding		119,213	2,654	121,867	175,646
<b>Total</b>		206,678	316,304	522,982	516,484
<b>NET INCOME</b>		3,386	4,078	7,464	93,940
<b>Transfers between funds</b>	15	501	(501)	-	-
<b>Net movement in funds</b>		3,887	3,577	7,464	93,940
<b>RECONCILIATION OF FUNDS</b>					
Total funds brought forward		447,136	123,300	570,436	476,496
<b>TOTAL FUNDS CARRIED FORWARD</b>		451,023	126,877	577,900	570,436

# Balance Sheet

## 31 January 2023

	Notes	Unrestricted funds £	Restricted funds £	31.1.23 Total funds £	31.1.22 Total funds £
<b>CURRENT ASSETS</b>					
Debtors	13	25,938	239	26,177	46,249
Cash at bank		522,105	164,939	687,044	615,573
		548,043	165,178	713,221	661,822
<b>CREDITORS</b>					
Amounts falling due within one year	14	(97,020)	(38,301)	(135,321)	(91,386)
<b>NET CURRENT ASSETS</b>		451,023	126,877	577,900	570,436
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		451,023	126,877	577,900	570,436
<b>NET ASSETS</b>		451,023	126,877	577,900	570,436
<b>FUNDS</b>	15				
Unrestricted funds				451,023	447,136
Restricted funds				126,877	123,300
<b>TOTAL FUNDS</b>				577,900	570,436

The financial statements were approved by the Board of Trustees and authorised for issue on ..... and were signed on its behalf by:

.....  
Mrs C Million – Trustee

# Cash Flow Statement

## for the Year Ended 31 January 2023

	Notes	31.1.23 £	31.1.22 £
<b>Cash flows from operating activities</b>			
Cash generated from operations	1	69,398	(41,888)
Gift Aid		1,417	(1,123)
<b>Cash flows from investing activities</b>			
Interest received		656	146
Net cash provided by investing activities		656	146
<b>Change in cash and cash equivalents in the reporting period</b>		71,471	(42,865)
<b>Cash and cash equivalents at the beginning of the reporting period</b>		615,573	658,438
<b>Cash and cash equivalents at the end of the reporting period</b>		687,044	615,573

# Notes to the Cash Flow Statement

## for the Year Ended 31 January 2023

### 1. RECONCILIATION OF NET INCOME TO NET CASH FLOW FROM OPERATING ACTIVITIES

	31.1.23 £	31.1.22 £
<b>Net income for the reporting period (as per the Statement of Financial Activities)</b>	7,464	93,940
<b>Adjustments for:</b>		
Interest received	(656)	(146)
Decrease in debtors	18,655	43,655
Increase/(decrease) in creditors	43,935	(179,227)
<b>Net cash provided by/(used in) operations</b>	69,398	(41,888)

### 2. ANALYSIS OF CHANGES IN NET FUNDS

	At 1.2.22 £	Cash flow £	At 31.1.23 £
<b>Net cash</b>			
Cash at bank	615,573	71,471	687,044
	615,573	71,471	687,044
<b>Net cash provided by/(used in) operations</b>	615,573	71,471	687,044



# Notes to the Financial Statements

## for the Year Ended 31 January 2023

### 1. ACCOUNTING POLICIES

#### **Basis of preparing the financial statements**

The financial statements of the charitable company, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Companies Act 2006. The financial statements have been prepared under the historical cost convention.

- Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity
- Designated funds are unrestricted funds earmarked by the Trustees for particular purposes.
- Restricted funds are subject to restrictions on their expenditure imposed by the donor or through the terms of an appeal.

#### **Income**

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

#### **Expenditure**

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

#### **Allocation and apportionment of costs**

Support costs are allocated pro rata to staff numbers involved with each charitable activity.

## 1. ACCOUNTING POLICIES – continued

### Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Plant and machinery	- 20% on cost
Fixtures and fittings	- 20% on cost

### Taxation

The charity is exempt from corporation tax on its charitable activities.

### Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

### Pension costs and other post-retirement benefits

The charitable company operates a defined contribution pension scheme. Contributions payable to the charitable company's pension scheme are charged to the Statement of Financial Activities in the period to which they relate.

## 2. DONATIONS AND LEGACIES

	31.1.23 £	31.1.22 £
Donations	20,589	25,565
Gift aid	994	1,129
	21,583	26,694

### 3. OTHER TRADING ACTIVITIES

	31.1.23 £	31.1.22 £
Fundraising events	673	940
Sales and earned income	-	1,198
	673	2,138

### 4. INVESTMENT INCOME

	31.1.23 £	31.1.22 £
Deposit account interest	656	146

### 5. INCOME FROM CHARITABLE ACTIVITIES

				31.1.23	31.1.22
	Information and Support £	National Influencing £	Core Funding £	Total activities £	Total activities £
Grants	101,508	235,374	32,000	368,882	359,162
Contract and Other Non Grant Income	81,542	-	56,911	138,453	222,284
	183,050	235,374	88,911	507,534	581,446

Grants received, included in the above, are as follows:

	31.1.23 £	31.1.22 £
Colyer-Fergusson Charitable Trust	14,883	2,483
John Ellerman Foundation	30,000	-
Sylvia Adams Charitable Trust	5,000	-
	49,883	2,483

## 5. INCOME FROM CHARITABLE ACTIVITIES – continued

	31.1.23 £	31.1.22 £
Brought forward	49,883	2,483
The Sobell Foundation	–	16,667
Garfield Weston Foundation	–	25,000
Department of Health and Social Care (DHSC) Covid Recovery	–	41,378
The Stonewall Park Charitable Trust	1,000	1,000
The Sir James Roll Charitable Trust	–	1,000
The Esmee Fairbairn Foundation	32,500	40,000
The University of Warwick	16,500	5,500
National Lottery Community Fund	131,291	131,291
Lloyds Bank Foundation – COVID	–	18,737
The Steele Charitable Trust	–	20,000
The Dulverton Trust	–	30,000
Pears Family Charitable Foundation	25,000	25,000
The Paypal Giving Fund UK	–	356
The Grace Trust	–	750
Kent Community Foundation	3,000	–
National Health Service England (NHSE) Covid Recovery	83,625	–
The Blagrove Trust	25,083	–
Beechwood Trust	1,000	–
	368,882	359,162

## 6. RAISING FUNDS

### Raising donations and legacies

	31.1.23 £	31.1.22 £
Staff costs	20,853	17,000
Fundraising	287	346
	21,140	17,346

### Other trading activities

	31.1.23 £	31.1.22 £
Bad debts	-	2,241
Aggregate amounts	21,140	19,587

## 7. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support Costs (see note 8) £	Totals £
Information and Support	193,247	34	193,281
National Influencing	186,694	-	186,694
Core Funding	111,596	10,271	121,867
	491,537	10,305	501,842

## 8. SUPPORT COSTS

	Governance Costs £
Information and Support	34
Core Funding	10,271
	10,305

## 9. NET INCOME

Net income/is stated after charging:

	31.1.23 £	31.1.22 £
Auditors' remuneration	1,355	1,856
Depreciation - owned assets	-	6

## 10. TRUSTEES' REMUNERATION AND BENEFITS

Vivien Cooper was employed full time as Chief Executive Officer with the express permission of the Charity Commission in recognition of her unique skills and experience. She is enrolled in a workplace pension scheme for her role as Chief Executive Officer. Vivien Cooper retired as a Trustee in July 2022.

A Trustee received £3,700 (£1,116 : 2021/2022) for managing a project that required their specific skillset and knowledge, not for their role as a trustee.

No Trustee or any person related to the charity had any personal interest in any contract or Trustee transaction entered into by the charity during the year other than as disclosed above.

### Trustees' expenses

There were no trustees' expenses paid for the year ended 31 January 2023 nor for the year ended 31 January 2022.

## 11. STAFF COSTS

No employee was paid over £60,000 in the year.

The average monthly number of employees during the year was as follows:

	2023	2022
Information, Support & Training	6	6.5
National Influencing Work	8	8
Total	14	14.5

## 12. TANGIBLE FIXED ASSETS

	Plant and machinery £	Fixtures and fittings £	Computer equipment £	Totals £
<b>COST</b>				
At 1 February 2022	8,161	1,258	5,075	14,494
Disposals	(8,161)	(1,258)	(5,075)	(14,494)
At 31 January 2023	-	-	-	-
<b>DEPRECIATION</b>				
At 1 February 2022	8,161	1,258	5,075	14,494
Eliminated on disposal	(8,161)	(1,258)	(5,075)	(14,494)
At 31 January 2023	-	-	-	-
<b>NET BOOK VALUE</b>				
At 31 January 2023	-	-	-	-
At 31 January 2022	-	-	-	-



### 13. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.1.23 £	31.1.22 £
Trade debtors	17,102	34,397
Other debtors	657	3,013
Gift Aid reclaimable	3,667	7,985
Accrued income	4,512	-
Prepayments	239	854
	26,177	46,249

### 14. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.1.23 £	31.1.22 £
Trade creditors	4,886	4,851
Social security and other taxes	8,457	4,826
VAT	1,359	8,271
Funds held for other organisations	15,423	15,423
Accruals and deferred income	105,196	58,015
	135,321	91,386

Funds held for other organisations £15,422 (2022: £15,422) represents monies held by the charity where it is working with other charities on joint projects. At 31 January 2023 these are as follows:

Learning Disability Senate	£12,840
Employment Dissemination	£2,582

## 15. MOVEMENT IN FUNDS

	At 1.2.22 £	Net movement in funds £	Transfer between funds £	At 31.1.23 £
<b>Unrestricted funds</b>				
Core Funding	422,723	27	500	423,251
Training Designated Fund	24,413	3,359	-	27,772
	447,136	3,386	500	451,023
<b>Restricted funds</b>				
John Ellerman Fund	-	25,335	-	25,335
The Esmee Fairbairn Foundation	9,888	(4,274)	-	5,614
The National Lottery Community Fund	39,138	(422)	-	38,716
CB-NSG	4,215	(18)	-	4,197
SHIEC	3,572	-	-	3,572
Peoples Postcode Trust	2,177	(2,177)	-	-
Risc	978	(478)	(500)	-
Asquith Legacy	3,199	-	-	3,199
National Lottery People's Project	32,650	(5,255)	-	27,395
Colyer-Ferguson Charitable Trust	2,483	(915)	-	1,568
Steele Charitable Trust	20,000	(20,000)	-	-
The Dulverton Trust	5,000	(5,000)	-	-
The Blagrove Trust	-	17,282	-	17,282
	123,300	4,078	(500)	126,877
<b>TOTAL FUNDS</b>	570,436	7,464	-	577,900

## 15. MOVEMENT IN FUNDS – continued

Net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
Core Funding	167,557	(167,530)	27
Training Designated Fund	42,507	(39,148)	3,359
	210,064	(206,678)	3,386
<b>Restricted funds</b>			
John Ellerman Fund	30,000	(4,665)	25,335
The Esmee Fairbairn Foundation	32,501	(36,775)	(4,274)
The National Lottery Community Fund	131,291	(131,713)	(422)
CB-NSG	-	(18)	(18)
Peoples Postcode Trust	-	(2,177)	(2,177)
Rrisc	-	(478)	(478)
National Lottery People's Project		(5,254)	(5,255)
Colyer-Ferguson Charitable Trust	14,883	(15,798)	(915)
NHSE Covid recovery	83,624	(83,624)	-
Steele Charitable Trust	-	(20,000)	(20,000)
The Dulverton Trust	-	(5,000)	(5,000)
Kent Community Foundation	3,000	(3,000)	-
The Blagrove Trust	25,085	(7,803)	17,282
	320,382	(316,304)	4,078
<b>TOTAL FUNDS</b>	<b>530,446</b>	<b>(522,982)</b>	<b>7,464</b>

## 15. MOVEMENT IN FUNDS – continued

### Comparatives for movement in funds

	At 1.2.21 £	Net movement in funds £	At 31.1.22 £
<b>Unrestricted funds</b>			
Core Funding	321,672	101,051	422,723
Training Designated Fund	39,032	(14,619)	24,413
	360,704	86,432	447,136
<b>Restricted funds</b>			
The Esmee Fairbairn Foundation	5,138	4,750	9,888
The National Lottery Community Fund	32,788	6,350	39,138
The Lloyds Bank Foundation	2,712	(2,712)	-
Baily Thomas Charitable Fund	20,000	(20,000)	-
CB-NSG	4,305	(90)	4,215
SHIEC	3,572	-	3,572
Peoples Postcode Trust	4,227	(2,050)	2,177
Rrisc	978	-	978
Asquith Legacy	3,689	(490)	3,199
National Lottery People's Project	35,999	(3,349)	32,650
Lloyds Bank Foundation Covid Fund	2,384	(2,384)	-
Colyer-Ferguson Charitable Trust	-	2,483	2,483
Steele Charitable Trust	-	20,000	20,000
The Dulverton Trust	-	5,000	5,000
	115,792	7,508	123,300
<b>TOTAL FUNDS</b>	476,496	93,940	570,436

## 15. MOVEMENT IN FUNDS – continued

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
Core Funding	277,705	(176,654)	101,051
Training Designated Fund	32,164	(46,783)	(14,619)
	309,869	(223,437)	86,432
<b>Restricted funds</b>			
The Esmee Fairbairn Foundation	40,000	(35,250)	4,750
The National Lottery Community Fund	32,788	(124,940)	6,350
The Lloyds Bank Foundation	18,738	(21,450)	(2,712)
Baily Thomas Charitable Fund	-	(20,000)	(20,000)
CB-NSG	-	(90)	(90)
The Sobell Foundation	16,666	16,666	-
Peoples Postcode Trust	-	(2,050)	(2,050)
Asquith Legacy	-	(490)	(490)
National Lottery People's Project	-	(3,349)	(3,349)
DHSC - Covid Recovery	41,378	(41,378)	-
Lloyds Bank Foundation Covid Fund	-	(2,384)	(2,384)
Colyer-Ferguson Charitable Trust	2,483	-	2,483
Steele Charitable Trust	20,000	-	20,000
The Dulverton Trust	30,000	(25,000)	5,000
	300,555	(293,047)	7,508
<b>TOTAL FUNDS</b>	610,424	(516,484)	93,940

## 15. MOVEMENT IN FUNDS – continued

A current year 12 months and prior year 12 months combined position is as follows:

	At 1.2.21 £	Net movement in funds £	Transfer between funds £	At 31.1.23 £
<b>Unrestricted funds</b>				
Core Funding	321,672	101,078	500	423,251
Training Designated Fund	39,032	(11,260)	-	27,772
	360,704	89,818	500	451,023
<b>Restricted funds</b>				
John Ellerman Fund	-	25,335	-	25,335
The Esmee Fairbairn Foundation	5,138	476	-	5,614
The National Lottery Community Fund	32,788	5,928	-	38,716
The Lloyds Bank Foundation	2,712	(2,712)	-	-
Baily Thomas Charitable Fund	20,000	(20,000)	-	-
CB-NSG	4,305	(108)	-	4,197
SHIEC	3,572	-	-	3,572
Peoples Postcode Trust	4,227	(4,227)	-	-
Rrisc	978	(478)	(500)	-
Asquith Legacy	3,689	(490)	-	3,199
National Lottery People's Project	35,999	(8,604)	-	27,395
Lloyds Bank Foundation Covid Fund	2,384	(2,384)	-	-
Colyer-Ferguson Charitable Trust	-	1,568	-	1,568
The Blagrave Trust	-	17,282	-	17,282
	115,792	11,586	(500)	126,877
<b>TOTAL FUNDS</b>	476,496	101,404	-	577,900

## 15. MOVEMENT IN FUNDS – continued

A current year 12 months and prior year 12 months combined net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
Core Funding	445,262	(344,184)	101,078
Training Designated Fund	74,671	(85,931)	(11,260)
	519,933	(430,115)	89,818
<b>Restricted funds</b>			
John Ellerman Fund	30,000	(4,665)	25,335
The Esmee Fairbairn Foundation	72,501	(72,025)	476
The National Lottery Community Fund	262,581	(256,653)	5,928
The Lloyds Bank Foundation	18,738	(21,450)	(2,712)
Baily Thomas Charitable Fund	-	(20,000)	(20,000)
CB-NSG	-	(108)	(108)
The Sobell Foundation	16,666	16,666	-
Peoples Postcode Trust	-	(4,227)	(4,227)
Risc	-	(478)	(478)
Asquith Legacy	-	(490)	(490)
National Lottery People's Project	(1)	(8,603)	(8,604)
DHSC – Covid Recovery	41,378	(41,378)	-
Lloyds Bank Foundation Covid Fund	-	(2,384)	(2,384)
Colyer-Ferguson Charitable Trust	17,366	(15,798)	1,568
NHSE Covid Recovery	83,624	(83,624)	-
Steele Charitable Trust	20,000	(20,000)	-
The Dulverton Trust	30,000	(30,000)	-
Kent Community Foundation	3,000	(3,000)	-
The Blagrove Trust	25,085	(7,803)	17,282
	620,937	(609,351)	11,586
<b>TOTAL FUNDS</b>	<b>1,140,870</b>	<b>(1,039,466)</b>	<b>101,404</b>

The Training Designated Fund represents funds set aside by the Trustees to invest in the CBF's capacity to deliver training and help diversify the charity's income.



## **16. RELATED PARTY DISCLOSURES**

There were no related party transactions for the year ended 31 January 2023.