



**The Challenging
Behaviour Foundation**

making a difference to the lives of people with severe learning disabilities

ANNUAL REPORT

2023–2024



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Foreword

From our Chair, Dr David Allen

It's a huge honour and privilege to have recently taken on the position of Chair of Trustees of this remarkable charity. My experience of the CBF goes back to 1999, when I was asked to write a commentary on an article that our CEO, Viv, published in the Tizard Learning Disability Review about how services had essentially failed her son, Daniel. Our paths have crossed many times since because, although starting from different points, we were on the same journey of trying to ensure the best possible quality of life for children and adults with severe learning disabilities and complex behavioural challenges. As a clinical psychologist and academic who was also an NHS senior manager, the CBF acted as a beacon of good practice and had a set of values and objectives that perfectly matched my own. It was both a safe haven and an inspiration as it always reminded me that, when battling organisational systems seemingly designed to make you give up, we should never accept 'No' for an answer.

My predecessor, Diane Lightfoot, has set a high bar in terms of how our chair should operate and will do my utmost to match the standards she has set. All our thanks are due to Diane for the commitment and expertise that she has shown as chair over an incredible period of ten years. Big shoes to fill doesn't really cover it, but I'm blessed to inherit a Trustee Board which is a fantastic blend of family carers and expert professionals.

We're a small organisation but one whose impacts are completely disproportionate to our size. The volume and breadth of activity described in this report is testament to that. We know that it's long, but please do take the time to read it. Even if you think you're familiar with all that the CBF does, I guarantee that at some point you will think "Wow! I never realised that the CBF did that!" As trustees, we are routinely astonished what our team and volunteers achieve and appreciative of how much this is valued from the feedback received from those we support.

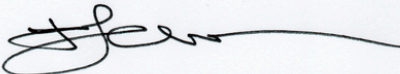
Family carers are embedded within the CBF and its work and is pivotal to our work and the impact it has. I would like to pay particular tribute to the late Jan Seamer who supported the CBF from its early beginnings and who has left the CBF a generous legacy fund. This fund is designated in her name to ensure the sustainability of the charity and its work with families, an approach which she worked tirelessly to promote. She demonstrated the importance of working with families as equal and valued partners, dedicating her time and expertise to really make a difference to the lives of many people. She is greatly missed. **CBF tribute to Jan Seamer:**

<https://www.challengingbehaviour.org.uk/news/family-carer-workshops-and-tribute-film-in-memory-of-jan-seamer/>

To misquote Voltaire, if the CBF did not exist, it would be necessary to invent it. Our strategic aim as a charity is to work towards the day when we're no longer needed because all the supports that children and adults with severe learning disabilities and challenging behaviour deserve are routinely, reliably, and comprehensively available. In recent times, that day has seemed to be retreating rather than coming closer. The work that we do will therefore remain important for some time to come and much remains to be done. We are therefore deeply indebted to everyone who helps to make it happen in a big or small way. Without you, there would be no CBF.



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


.....

Dr David Allen, Chair of Trustees



“The CBF is such a huge achievement and..... such an influential advocate and expert voice for people with challenging behaviour, their families and the wide network of services which should in theory support them. The CBF is a powerful force to be reckoned with on the national agenda.”

“We all owe a huge thank you because you have done so much to raise the profile of the people and the families who live with challenging behaviour and to change attitudes and expectations at a time of (sadly) decreasing resources. And, most importantly and not least, you have always been wonderful in seeing, engaging and listening to the families like mine, who are so easily overlooked as they desperately try to create good lives for their children.”



Report of the Trustees

For the year ended 31st January 2024

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 31st January 2024. 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 Values

Inclusion – We embrace diversity and actively ensure every perspective is sought, valued, and included respectfully and with dignity, promoting connections and collaboration.

Understanding & Compassion – We aim to comprehend diverse perspectives with empathy and openness, to support and help make things better for people in need.

Co-production and collaboration – Our work is co-produced, and we work collaboratively

Integrity & Independence – We ensure that our work is not compromised by conflicts of interest (e.g., through accepting funding from a particular source) and we retain our core focus on getting the right support in the right place at the right time, upholding honest and ethical principles in all our work.

Advocacy – We champion the rights and well-being of individuals with severe learning disabilities and their families with passion and dedication.

Learning through experience – We record, reflect and learn from our work and its outcomes to improve and amplify our impact.



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
- Providing 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.

What is Challenging Behaviour

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 over 30,000 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** (www.challengingbehaviour.org.uk/understanding-challenging-behaviour)

30,000+
in the UK

who have a severe
learning disability
and are at risk of
developing
behaviours that
challenge



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.

<https://www.challengingbehaviour.org.uk/information-and-guidance/positive-behaviour-support/pbs-your-questions/>

“ 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.

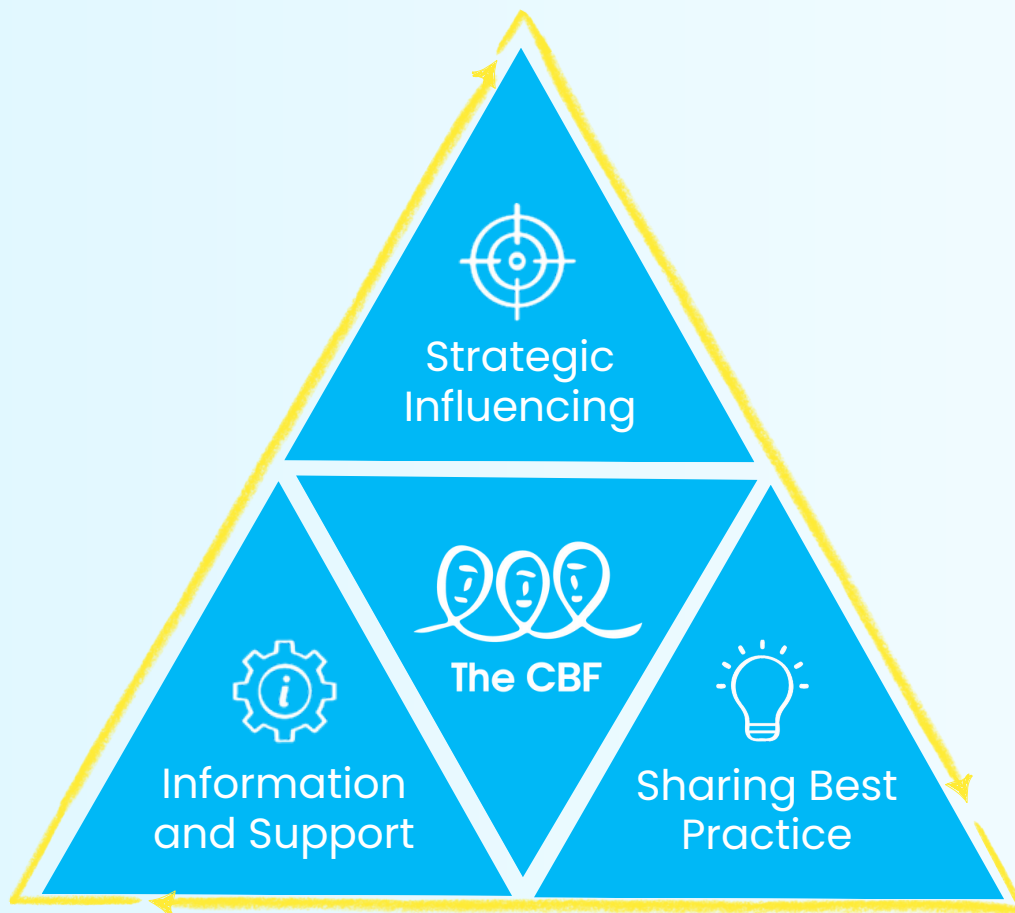
– Mansell 2, 2007



Our objectives are to ensure that with good support each individual can 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



How we work

As a small charity with limited resources, we carefully consider the impact of our work. Our Theory of Change work identified four key communities across the lifespan where we can have the greatest impact on people's quality of life, and we will focus our work around these groups. 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 three areas of work: **'information and support,' 'strategic influencing'** and **'sharing best practice'** and explore new ways to measure our impact.

Lived experience is embedded within the organisation and informs and shapes all our work. All our training workshops are co-produced and co-delivered by a PBS practitioner and a family carer with lived experience, modelling the partnership approach we promote.

As an organisation we prioritise families' needs over administrative convenience. The range and scope of our work is wide as it reflects the breadth and complexity of the systems and services that families must navigate through to secure the support, they and their relative needs.

We adopt a lifelong human rights approach across 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. This year we have co-produced new resources with family carers including setting out how we at the CBF work with families in co-production along with good practice examples:

<https://www.challengingbehaviour.org.uk/what-we-do/sharing-best-practice/co-production/>

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.

“Nothing is ever done without us’ – This is key to the CBF’s mission statement, and above all with a restorative, ‘How can we help’ ethos. When systems are broken, people get broken, the CBF and their members help each other to mend, heal and thrive.’ Family Carer

Internships at the CBF

This year we have again been able to offer an internship at the CBF. We have now had thirty-two 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. Our Interns are paid the Real Living Wage.

Previous CBF interns have gone on to:

- Senior 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 and to secure work as a Postdoctoral Researcher in the field of learning disabilities

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 internship at the CBF provided a unique opportunity to collaborate with professionals in health, social care, education, and research I would not have encountered otherwise. Throughout the internship, I have gained valuable knowledge about learning disability and developed transferable skills. I had the chance to contribute to various charity and research projects. The welcoming and supportive environment at the CBF put me at ease from day one, allowing me to openly discuss any questions or concerns with my colleagues. I am grateful for the opportunity to be part of such a fantastic team. I highly recommend this internship to anyone passionate about learning disabilities who wants to make a meaningful difference in the lives of individuals with learning disabilities and their families.” – 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: <https://www.challengingbehaviour.org.uk/for-family-carers/>

Information for professionals can be found here: <https://www.challengingbehaviour.org.uk/for-professionals/>



“Thank you for all the literature and support I have received through your magazine over the last couple of decades – it has been a great support emotionally and very informative on so many topics. – a huge thank you” – family carer

“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

“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” – family carer



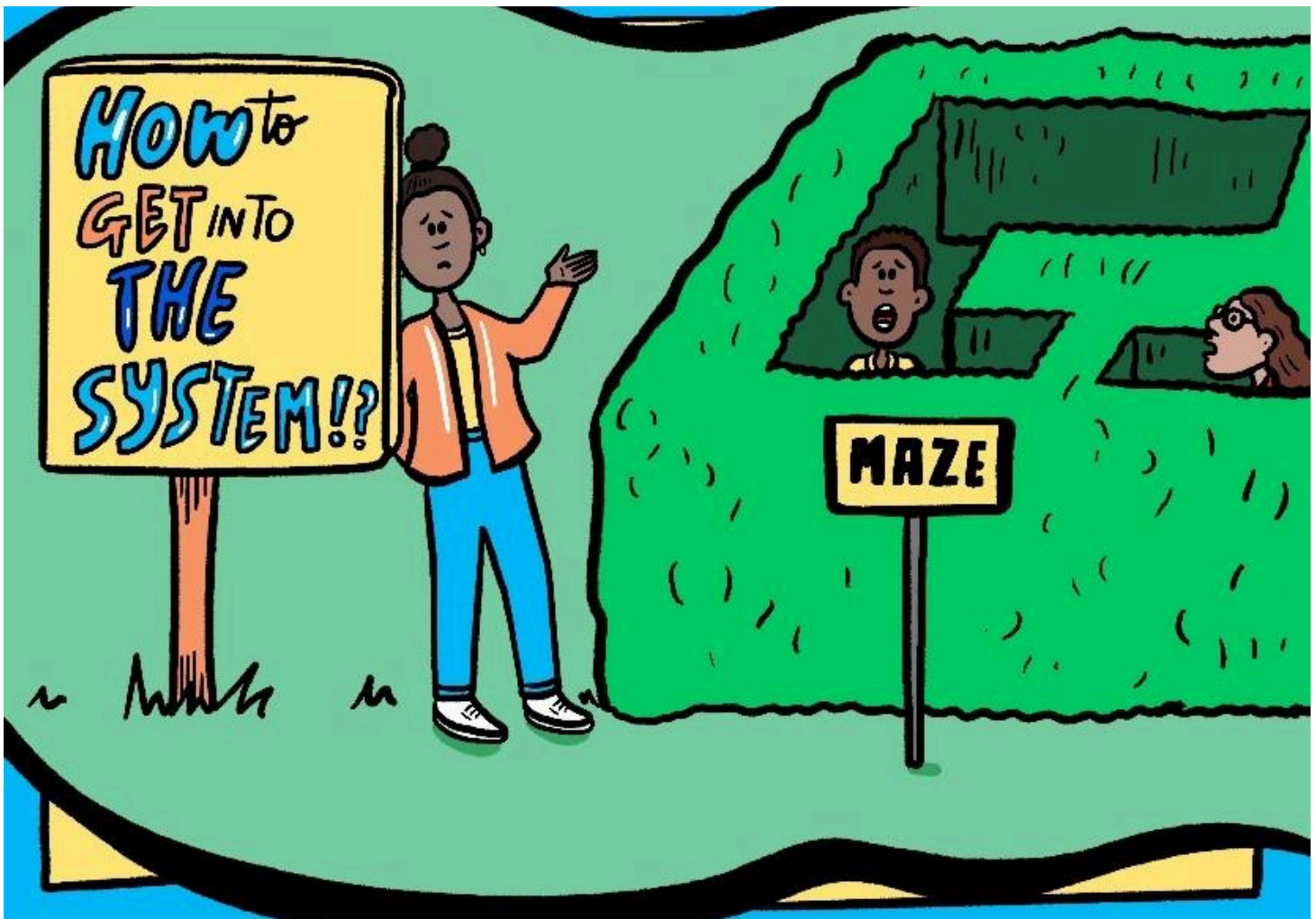
Strategic Influencing



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.



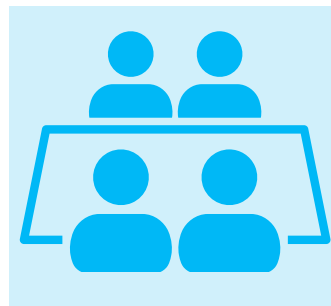
There are numerous individuals and organisations working within the sector and we work hard to identify and work with them to develop good relationships and facilitate and promote collaborative working and co-production.

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.

<https://www.challengingbehaviour.org.uk/what-we-do/national-strategy-group/>



We promote and highlight the need for an early intervention approach, to work with and invest in families as valued partners, and with full and meaningful co-production.



***'Co-production as an approach can only succeed when all parties involved feel valued, and most importantly, that the person with the disability is truly at the centre and heart of designing outcomes.'* – CBF Family Carer**

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, investment in supporting families and promotion of enhanced skills and training for support workers and paid carers.

“Thank you very much for this, they are such a great group, they have just blown us away during this project! Please do pass on our thanks” – Researcher

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 have invested additional capacity, using our reserves, to support, build on and deliver best practice learning from our project work. We continue to work with local family carers and stakeholders in specific geographic areas to provide additional resource, capacity, and experience to empower local families and facilitate their input at a strategic level.



The knowledge I have gained is priceless and will ensure I improve my practice – workshop participant

Very informative and also eye opening to see things from the parents perspectives – workshop participant



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



Achievements and Performance

Information and support




“I just wanted to say I am so blown away by the amount of support and knowledge this network has, and everyone is always so willing to help” – family carer

Family Support

Our family support service has responded to 3235 queries through our support line, email and website this year which is a 23% increase on the previous year.

We had over 39k resources downloaded from our website, an 18% 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.



3235
23%

**Queries through our
support line**



39,000+

**Resources downloaded
from our website**



18%

Increase in downloads

Family carers who contact the CBF may need differing levels of support and information, and are initially 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 (<https://www.challengingbehaviour.org.uk/information-and-guidance/>) which can be emailed or downloaded from the website. We are aware that a proportion of the families we support are digitally excluded and therefore we adjust to ensure they receive our information and support. If required, our resources can be posted out as some families may have limited access to IT.

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. Other 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 are trying to navigate all these issues against the backdrop of a cost of living crisis and cuts to services.

Families approaching us with these multiple complex issues often require intensive casework over a long period. The average period of support is four months with some families returning over many years for further support as new issues emerge. To meet the diverse needs of the family carers we support we offer translation services via Language Line and share relevant information from other organisations as appropriate.

"If it wasn't for the help of CBF, I wouldn't know how to help my son get discharged and his quality of life would have significantly declined. Since CBF's involvement, my son is a lot happier, he is able to speak properly and go out and about with carers. I really owe it to the staff at CBF for all that they have done for me and my son."



Case Study

P's family had purchased a property for P to live in. They intended for D, P's lifelong friend to move in to live with him as they had been separated when their old care home closed down during the pandemic. The process was delayed and initially the CBF supported P's mum to request a Best Interests meeting to decide whether he should live in the bungalow.

It was decided it was in P's best interests but the Local Authority (LA) were unwilling to pay for the model of support that P would need in the bungalow from a provider the family had found. The CBF caseworker supported the family to attend meetings and it looked as if things were progressing. However, the LA then changed their position.

A referral to a solicitor was made and a letter before action was sent. Following some initial time consuming reassessments, a Commissioner was bought on board to look at the case. Within 12 days P was moved into the bungalow with support provided by the preferred provider.

The CBF are providing ongoing support to D's family, and it is hoped that they will also move into the property this year.

The CBF's support has encouraged the professionals involved to 'think outside the box' when arranging support to ensure that P and D's Human Rights are upheld, and that support is truly person centred.

Legal Panel

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 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)

"...when you call, they (CBF) answer immediately and provide support and guidance when you need it most, all for free and with empathy and a vast knowledge about multiple issues. They have sent me so much information via post and been a listening ear when we have been through a really traumatic time in the last few months." – Family Carer

Peer Support

Families report feelings of isolation – and that peer support is incredibly valuable and helps to address this. We continue to support range of initiatives that provide different types of peer support to meet the varying support needs of families who contact us

<https://www.challengingbehaviour.org.uk/for-family-carers/peer-support/>

“I wanted to say that I love this network, and the Challenging Behaviour Foundation. What a gift! I so love all of this.! It's the behaviours that challenge that I want advice and guidance with, and this network is perfect. It is really encouraging to hear from parents whose children are now in their 20s and 30s and the parents are now real pros at this. – Family Carer

Our peer support includes:

Listening Ear calls We continue to support 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.

*“I enjoyed having a conversation with her, we spoke for 45 minutes and would have carried on. Thank you for introducing me to the Listening Ear service, good to know this session is available whenever I need one”.
– Family Carer*

Email Networks

Our family carer email network now has around 520 members and continues to be regularly used with 350 questions and responses circulated on 132 different topics. 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 around 1200 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. This year 76 questions and responses were circulated on thirty-four different topics.

Carers Catch up

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 most families who contact us describe feelings of isolation. Now that the pandemic has passed, we continue to facilitate these groups and working with families we plan to develop some themed carers catch up meetings. We are reviewing feedback and consulting families about what they find helpful and useful as part of our ongoing review of our support and impact.

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 four hundred members and membership 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'd also like to take the opportunity to thank you and the CBF team. They have been a wonderful support to us and the CBF network has made us feel that there are people out there who understand M's disabilities and are on his and our side. – 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 made up of a range of organisations that run helpline support for families of people with learning disabilities. Meetings happen once a month via Teams, and we share information about each of our services and resources, identify common issues coming to us from families and provide peer support to each other, which is especially appreciated by those who attend. This year we delivered our Trauma Awareness training workshop to the helpline collaborative as a way of sharing knowledge and best practice.

Challenge Accepted (CBF podcast)

With generous funding from the Colyer Fergusson Charitable Trust we were able to produce a series of six podcasts focused on the wellbeing of family carers living in Kent. Episodes included a mix of families speaking about their lives caring for their relative, describing what they do to support their own wellbeing and information about support available with a focus on promoting carers assessments. The podcast has been downloaded 531 times with 'Another Way of Not Meeting People', a conversation between three family carers about their experiences, being the most popular episode. This was closely followed by 'So much of life is I'm terribly sorry, I'm so sorry' which included a conversation with the writers of the BBC show 'There She Goes' who have a teenage daughter with severe learning disabilities. A special Christmas episode was also well received.



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 the family carer experiences via our helpline and casework 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.

The “system” which is there to support individuals with severe learning disabilities whose behaviour challenges, and their families, is complex, disjointed and difficult to navigate. Families have to identify support through education, health and social care—which is divided between child and adult support with different eligibility criteria and regional variations. The legal and regulatory systems provide further levels of complexity. Our strategic work is therefore 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 are very grateful to the John Ellerman Foundation and Paul Hamlyn 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, who are all equal partners in the group. 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. <https://www.challengingbehaviour.org.uk/what-we-do/national-strategy-group/> There are currently over ninety core CB-NSG members who have significant knowledge and expertise or lived experience, and / or a senior level role in supporting and delivering services to people with learning disabilities, and over six hundred associate members who commit to working following the values and principles of the co-produced Challenging Behaviour Charter.

“You had a good balance of family members and professionals. There was a great deal of expertise at the meeting and people who felt passionate to make a difference. The current system is so difficult to change, and we are definitely stronger together.”

“Thank you for getting us all together to think about life changing decisions and policies.”

“I wish to place on record my thanks to the CBF team and policy staff for organising and delivering such a worthwhile event.”

Co-produced lifelong Action plan

Work has continued on the co-produced, lifelong action plan that was started at the Campaign Families day (September 2022) and which has been built on since, including at the CB-NSG meetings. CBF staff presented the work that has been done so far at a parliamentary reception for Learning Disability Week, sharing this work with parliamentarians and other key stakeholders. Work has also been underway to gain input from wider stakeholders outside of the CB-NSG to ensure that this plan is properly co-produced, including work to gain the input of people with a learning disability.



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 Mental Health Act Consultation activities
- Participated in the All-Party Parliamentary Group Meetings
- Agreed campaigning priorities for the coming year including campaign work in the run up to the government missed target of reducing the number of people with a learning disability and autism in inpatient units by half by the end of March 2024

We have initiated and convened meetings of a collaborative group of charities that campaign in this area to meet and share campaign activity and timetables. The aim is to ensure our work is coordinated and complimentary- and to share each other's campaign work to amplify the messages.

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 from 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

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 because of the cost of living crisis and the ongoing inequalities due to failures in Transforming Care.

Positive Behaviour Support/Research Sub-group

This group has appointed co-chairs and 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. Plans are in place to commence this working group.

Data Sub-group

We remain concerned about meaningful data collection- and how it is analysed and used to inform policy and practice in "the system."

The group has continued to focus on reviewing and using the data published by NHS England (NHSE) 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 group members provided input to a researcher studying the data collected by the CQC and whether it could be used to predict poor or abusive care in services, sharing their insights in two meetings.

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. This work is linked to the campaign group work, and in partnership with Mencap we continue to produce and share regular infographics setting out the data about inpatients.



Housing Sub-group

This has included working closely with NHSE Strategic Housing Lead for Learning Disabilities and Autism at NHS England to feed into their work to develop a housing strategy for people with a learning disability and autistic people. Housing Group members, have also linked in with the 'National Housing Community of Practice', a group organised by NHSE in conjunction with the Local Government Association (LGA) and the Association of Directors of Adult Social Services (ADASS).

Other strategic influencing

Protecting Rights: Eliminating Restraint Group (PR:ERG)

Formerly known as the Reducing Restrictive Interventions and Safeguarding Children (RRISC) group, 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. Additionally, the group met to input to the Department for Education Call for Evidence on the Use of Restraint in Schools. This meeting was attended by a wide range of stakeholders from the PR:ERG group and officials for the Department for Education. Over the next year we will continue to work to ensure that the government upholds its commitment to introduce a legal duty to record and report restraint to parents in England.

The External Support Group (ESG)

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. A co-produced animation of the work of the ESG is here: **External Support Group (ESG)** <https://www.challengingbehaviour.org.uk/what-we-do/projects-and-research/support-and-services/the-external-support-group-esg/>

ESG members have agreed to review and reflect on the work of the ESG so far, and a report with recommendations has been produced which will be taken forward in the coming year.

STOMP/STAMP

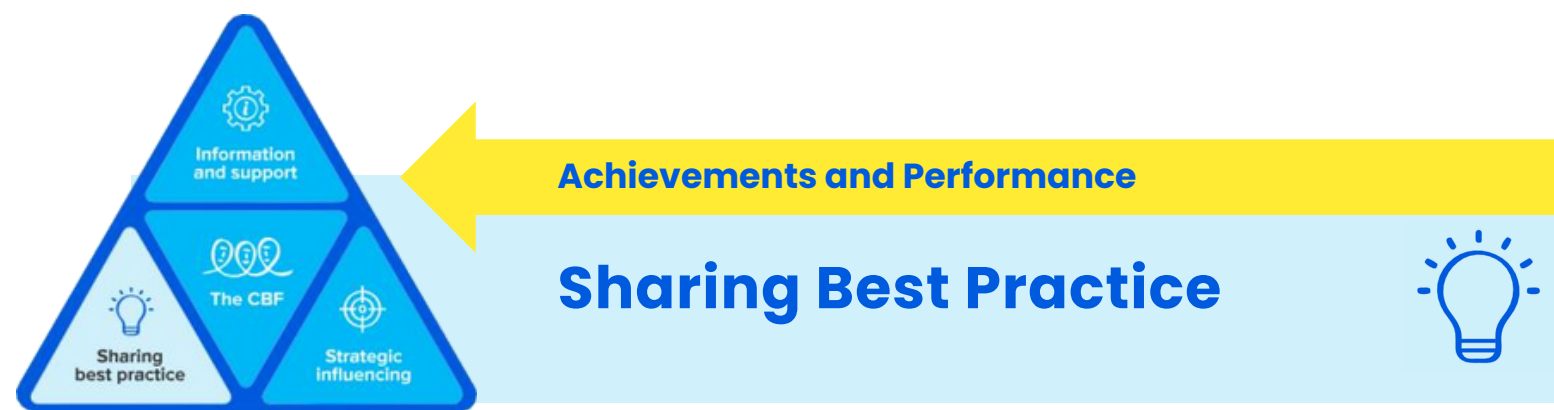
The **STOMP** (Stopping Over-Medication of People with a Learning Disability, Autism or Both) **STAMP** (Supporting Treatment and Appropriate Medication in Paediatrics) programmes are initiatives within NHS England (NHSE) to try to address the issues around medication. We provided a short report from family carers of their experiences of the impact of STOMP and STAMP. This highlighted the need for greater progress and included recommendations for the next steps which NHSE are still considering.

Older family Carer work

We have worked with older family carers to hear their experiences, which has enabled us to identify what specific issues older family carers face, and what support they need. We have worked with family carers to use what they have told us to begin to pilot a resource which aims to help family carers plan for the future and offer peer support alongside using the resource.

National safeguarding review

This review was commissioned following abuse exposed at Hesley Services, providing 52 week residential school provision for children and young people with complex needs. It was led by Dame Christine Lenahan at the Council for Disabled Children who produced two reports. The CBF provided input in multiple ways during the review and including ensuring that family carer experiences were gathered as part of the development of the recommendations. The CBF also suggested contributors for round table events to review the findings and contribute to the recommendations within the final report. **CBF input to Child Safeguarding Review:** <https://www.challengingbehaviour.org.uk/news/child-safeguarding-practice-review-panel-publish-phase-2-report-into-hesley-group-settings/>



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.

Our range of workshops include:

- Trauma Awareness
- Pica behaviour
- Whole Family Approaches
- Positive Behaviour Support (Understanding challenging behaviour and supporting behaviour change)
- Communication and challenging behaviour



We continue to recruit, train and support co-facilitators with in-built evaluation and quality monitoring procedures and provide additional support to family carers delivering the workshops to ensure they are not further traumatised by the sensitive and difficult content.

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, and in response to evaluation feedback, we have co-produced new materials to deliver a longer and more in-depth workshop. The workshops convey the voices and consistent messages of the families, are co-facilitated with a family carer and provide awareness of the issues and key areas for changes in practice. We invest in robust recruitment and provide training and ongoing support for co-facilitators.

The Tizard Centre at Kent University commissioned KMTV to produce a short documentary film which highlights the issues, the research and the workshops. **Family Trauma: A Broken Care System:** https://www.youtube.com/watch?v=eZ_C-_CnxaQ

A collaborative conference to highlight the issues with Kent University (the Tizard Centre), Leeds University, Cerebra and the CBF, was held, at the suggestion of CBF, in the summer of 2024.

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



Step 1: Identify the area for improvement

Step 2: Build relationships & learn communication methods

Step 3: Engage in activities to evidence experiences, preferences and views

Step 4: Share evidence to influence positive changes

Following 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 secured funding from 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. The three year 'What Matters to Me' project builds on previous work by CBF, the Tizard Centre and others. In year two we worked with partners and individuals with complex needs and their families to gather their experiences and identify areas and issues of key importance to them, which will be shared in an accessible youth manifesto in year 3.

Advocacy

There are two main areas of work around advocacy that have continued into this year: 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 also gathered the views of family carers both in their role as advocates and their views about advocacy support provided to their adult relatives. Other steering group members collected input from other stakeholders and all the individual reports were collated into a national report which was due to be published in March 2022. The report was eventually published in November 2023.

We have pressed for the report recommendations to be considered and acted on by the Department of Health and Social Care, and initiated, drafted and sent a joint letter from the steering group to the Minister, which resulted in meetings to discuss the report and recommendations. We continue to highlight the need for the recommendations to be resourced and implemented.

Regional work

The CBF partnered with organisations in two local areas to identify family carers experiences of advocacy and of advocating for their relatives and what would be helpful to support them in this role. A comprehensive, co-produced resource was produced and is now available for family carers online and in print. **Family Carer Advocacy Resource – Challenging Behaviour Foundation:** <https://www.challengingbehaviour.org.uk/information-and-guidance/rights-and-the-law/00-family-carer-advocacy-resource/>

Getting It Right Project



We finished 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. We completed our work with Camden including holding a stakeholder event to bring together family carers and professionals to agree an action plan and working with an independent evaluator to learn from the third year of the project.

We are grateful to Black Country NHS Foundation Trust for funding the CBF to employ a project worker to support the delivery of the action plan developed during Year 2 of the Getting it Right Project. This work will focus on early intervention, transition and ensuring family carers voices are heard in strategic planning.

Additionally, we were delighted to bring together our partners from West Sussex (year 1), Black Country (year 2) and Camden (year3) to a CB-NSG meeting to reflect on the project as a whole. We have taken this learning and subject to funding hope to build on this work this year.

<https://www.challengingbehaviour.org.uk/what-we-do/projects-and-research/support-and-services/getting-it-right/>

Keyworker Project

Following on from CBF's work to support partners in the Black Country to develop a peer support service we completed an evaluation of the service. These evaluations reported that family carers felt more listened to and understood, more in control and more hopeful after receiving family peer support.



“The keyworker and Family Peer Worker were able to talk to both of us and understand how we were feeling. But it gave us a wider understanding that we were not alone and there is someone to listen to us. It gave us that grounding and initial understanding and helped us cope with ourselves before we could start helping our son and helping the family” – Family carer



The keyworker pilot in the Black Country was identified as a good practice case study for Integrated Care Boards (ICBs) in the Statutory Guidance on Working with People and Communities. In particular, the co-production with children, young people and families was central to the success of the project. Co-production was in place from start and present throughout the strategic and operational levels of the creation of both the keyworker and peer support worker roles.

Key worker pilot – Challenging Behaviour Foundation:

<https://www.challengingbehaviour.org.uk/key-worker-pilot/>

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.



“The collaboration with the PCAG (Parent Carer Advisory Group) has gone extremely well so far and has been very effective for study processes. We attribute this to the collaboration with a very experienced PPI (Patient and Public Involvement) partner and an organisation (the Challenging Behaviour Foundation) that has experience in supporting PPI in research, including processes and infrastructure (e.g., through their intern training scheme supporting PCAG work, ways to compensate parents for their time). Importantly, the CBF are committed to genuine PPI engagement which aligns well with the values of the rest of the research team.”



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.



MindEd

We continued 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. The CBF has supported family carers as co-authors to help write the session content for ten modules. The first six of these modules have been launched with the final four delayed slightly in their final stages of completion with a plan to launch the modules by March 2024. MindEd are hoping to further this work with modules on STAMP (Supporting Treatment and Appropriate Medication in Pediatrics) and the CBF will aim to continue supporting this work.

Newsletter

We produced an electronic and printed newsletter on the topics of 'Health Matters' and 'Connections and Co-Production' which was sent out to around four thousand people electronically and three thousand people in hard copy to ensure families throughout the UK without digital access were not left out. www.challengingbehaviour.org.uk/news/challenge-newsletter-spring-2023-health-support-post-covid/

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



Social Media

We continue to use our social media platforms to share good practice information and practical resources. All our social media platforms have all 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, and we evaluate our work to ensure we continue to make a difference. We are exploring opportunities to access external expertise for impact measurement and will take this forward when resources allow.

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. Collaborative working requires investment in building and sustaining relationships and approaches, and identifying shared objectives and messages and we will continue to create opportunities to do this. 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 £836,108 compared with £530,446 in 2022/23, the increase being the result of a generous legacy of £316,004 received from the late Jan Seamer. Excluding the legacy, incoming resources reduced slightly to £520,104 reflecting principally the end of a three-year grant from the National Lottery Community Fund, offset by an increase in earnings from charitable activities, especially sharing best practice. This type of work is, however, made up mainly of ad hoc projects which inevitably fluctuate from year to year.

The increase in resources expended from £522,982 in 2022/23 to £571,304 in 2023/24 reflects the higher level of charitable activity combined with the inflationary pressures felt across the economy. The financial situation continues to be very challenging as indicated by net expenditure within general funds for the year of £45,248, despite careful planning and stringent budget management. Overall, however, receipt of the Jan Seamer legacy resulted in total funds showing net income of £264,804. The support of trusts and foundations remains vital in enabling us to 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. Grants from BBC Children in Need, the Blagrave Trust and the John Ellerman Foundation have enabled us to further our policy and influencing work, while the Paul Hamlyn Foundation has supported our activities relating to young people and transition. Thanks are also due to the Colyer-Fergusson Charitable Trust and the Baily Thomas Charitable Fund which have helped to fund our family support service and to the Pears Family Charitable Foundation and several smaller foundations for supporting core costs.

Looking ahead, the funding environment is becoming more challenging than ever, especially in the light of the poor state of the UK's public finances. 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. Inflation continues to push up costs making the recruitment and retention of staff more difficult. In the light of this challenging situation, the Trustees have decided to designate the Jan Seamer legacy for the purposes of promoting the longer-term sustainability of the CBF and its work with families and, over the next few years, to fund development opportunities that cannot be funded from other sources.

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 general 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 CBF's charity's 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.

General funds amounted to £378,002 at 31 January 2024, representing approximately five months of running costs, after taking account of estimated closure costs, based on predicted expenditure for 2024/25. This is slightly below the target and reflects the challenges the CBF faces in securing funding for its work.

Our Plans for the Coming Year

Although our ultimate aim as an organisation continues to be that we are not needed because the 'system' works, we know this is a long-term aim and in the interim, we need to sustain and develop our work and maximise our impact. To support this, we will continue to focus on our key communities (Early years, transition to adulthood, supporting older family carers and supporting individuals in or at risk of crisis). 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 plan to recruit two new paid interns in the coming year: internships require skilled investment from our Senior Management Team and a comprehensive induction and line management process.

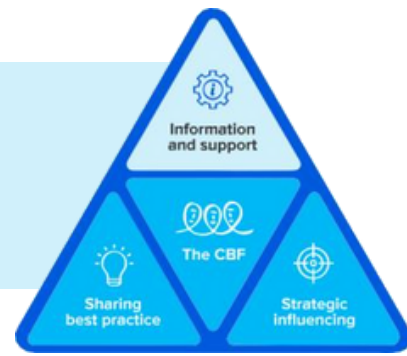
Our internships have, as a result of this investment, proved very successful and provide recent graduates with valuable work experience and insight into the issues faced by families, as well as providing the charity with additional capacity that delivers good value for money.

Funding challenges continue as the pandemic costs are repaid alongside the impact of the cost of living crisis on our organisation, the families we support, and the wider community. Trustees are mindful of potential future financial risks and plan accordingly, including close financial monitoring. In addition, the General Election in 2024 will create additional disruption, uncertainty and delays to the systemic change we work with others to drive forward.

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 successful model of 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 systemic 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.



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. Our Family Support “offer” includes a range of information and support, delivered in different ways to meet the diverse needs and preferences of families.

Funds generously provided by Pears Foundation, Colyer Fergusson Charitable Trust and the Baily Thomas Charitable Fund for our specialist 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 runs 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.

Work will continue to review the diversity of the families who use CBF’S information and support service. Initial observations show that a wide range of families contact us for support including those for whom English is not their first language and those who do not have access to the internet. We will continue to offer Language Line interpreters and 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. As so much information is now available online only, we are mindful of the “digital divide” which causes greater marginalisation and isolation. We will work with the Helpline Collaboration to review how we support people over the coming 12 months.

We will further improve relationships with other family support organisations and charities that run helplines by continuing to lead the co-ordination of regular meetings which has proved highly beneficial, providing peer support, problem solving and opportunities for joint working. This helpline collaborative enables efficient signposting to others when appropriate and helps us to identify any gaps in support. We will continue to facilitate this group and to identify joint working and training and other opportunities as well as inviting any new members to join the group.

Due to the success of Challenge Accepted, the CBF's podcast, we will be recording new episodes. The first two will focus on the summer holidays and will be published in July. Family Carers will be invited to a family day to share their experiences as feedback has suggested that listeners enjoy the open, honest discussion and it reduces feelings of isolation in listeners. We also plan to record a series focusing on the transition from children to adult services as this is a known pinch point where families are at risk of entering crisis. This will be published towards the end of 2024 to encourage families to think about transition well before the end of the school year.

We will ensure our resources are tailored particularly to our four identified priority groups. Work to co-produce new resources for older family carers will continue and we will pilot these in the coming year. The new comprehensive family carer advocacy guide will be promoted and shared, and our regular programme of reviewing and updating our resources will continue, with an updated transition guide prioritised.

A planned review of all of our information resources will take place over the coming year. Resources will be updated or rewritten to provide the most up to date information and to ensure they are accessible to families.

Our family support and information service take a lifelong approach and we will consider how we target families in particular situations to increase our impact and as part of that, we have reviewed how we record information to enable us to collect data and when we have a full year's worth of data we will begin to analyse this.



Last year, we used some of our unrestricted reserves to invest in piloting a new role leading this strand of our work. The aim was to use this pilot role to test opportunities that emerge from our project work demonstrating delivery of a tested and locally sustained model. It aimed to focus on good outcomes that properly engage local families as valued expert partners at a strategic and grass roots level, and to promote this approach through our co-produced and co-facilitated workshops.

Co-production is and always has been 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 worked with families to develop a resource outlining what family carers expect from co-production. This resource will be used and promoted 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.

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.

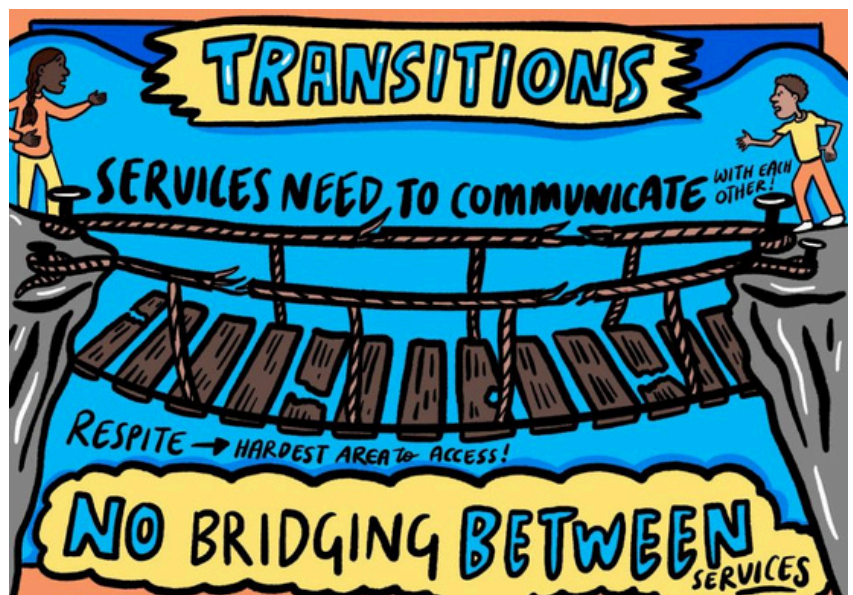


We will therefore continue to develop our work on engagement with children, young people and adults with complex needs, collaborating with other leaders in this field, to find innovative ways to seek their views, and to demonstrate that it is possible to consult with them in a meaningful way. At the 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 build on the work of the 'What Matters To Me' project, alongside and in partnership with our two project partners and the active engagement with the young people as we co-produce an accessible Manifesto for change. As this project enters its final year, we will work with steering group partners to co-design the next steps for this work and identify potential funding sources to take it forward.

In the coming year we plan to focus on transition (age 14-25) due to identifying it as one of our four key priorities in our Theory of Change. We know this is a time of change and increased risk of the system not being joined up, gaps in support and challenges with transitioning to new support and services and how they are funded.

There is a high instance of admission to inpatient units during this age range. We will focus on this area, with activities including; inputting to the law commission review and working with officials on key government programmes. We plan to revise and update our 'moving into adulthood' resource and our work in the Black Country will produce a bespoke resource around local transition support.



We will work with an independent consultant funded by the Paul Hamlyn Foundation as part of their grant offer, to develop a framework to measure our impact around transition.

We will set up a new CB-NSG subgroup for transition to bring together a range of stakeholders to identify actions to include within the co-produced action plan.

CBF workshops are an accessible way to share core messages and approaches and fulfil our charitable objectives. The method of co-production and co-facilitation delivery models the approach we promote. Having invested in new workshops and recruiting training and supporting new facilitators we plan to promote these more widely now we have increased our capacity for delivery. New promotional materials have been co-produced and will be disseminated and we will prioritise securing funding opportunities to enable us to deliver more workshops in the coming 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 in partnership with a range of other individuals and organisations.

We will work to promote the need to develop a national learning disability research strategy.

Having recruited, trained and supported new co-facilitators over the past 12 months we will promote 'Whole Family Approaches' and Pica (eating inedible objects) workshops 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. Our newly recruited and supported co-facilitators will enable us to promote and disseminate these to a wide range of professionals who have a role to play in supporting families. Now that the Tizard Centre, KMTV and CBF 12-minute documentary film is completed and available it will help with awareness raising and dissemination of the key messages from families about the trauma the system creates. **Family Trauma: A broken Care System:** https://youtu.be/eZ_C-CnxaQ

We are working in partnership with colleagues from Leeds University to arrange a national conference that will focus on this issue, which will be held in the Summer of 2024.

Building on our national and regional advocacy work, now that our Family Carer Advocacy resource is completed and available, 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. **Family Carer Advocacy Resource:** <https://www.challengingbehaviour.org.uk/information-and-guidance/rights-and-the-law/00-family-carer-advocacy-resource/>

We have worked with SF-DDARIN to develop a project to make research findings more accessible for family carers. The aim of the Research Engagement, Access and Dissemination (READ) project is to generate engaging and accessible research summaries of key publications and highlight key learning points and implications from the studies. A working group and an outline project plan have been established. In the coming year we plan to recruit a family carer to join the working group and consult with family carers to shape the development of the project. We hope to secure further funding to pilot the project.

We will continue to work with MindEd to co-produce resources with family carers, to publish the four remaining modules funded last year, and co-develop further modules about STAMP (Supporting Treatment and Appropriate Medication in Pediatrics).



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. Investing in, developing and maintaining relationships with others with similar related aims to the CBF will increase our collective impact. Our collaborative, solution-focused, and evidence-based approach will continue to be prioritised. Working collaboratively takes longer and requires time and skilled management to build positive relationships and trust to focus on shared aims and objectives rather than differences of opinion. We strongly believe we can achieve more by working together and, by employing our well established 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. Following the General Election there is likely to be a period of inertia during the election of new MPs and Ministers being appointed, inducted to their brief and setting priorities. Whilst this can be a period that is frustrating it is also a period of opportunity- to confirm and refine our collective key messages, present a united front and make the case for the changes we want to see. We will bring together a group of learning disability organisations to co-ordinate and amplify our messages and increase our collective impact, although we do not underestimate the challenges this will bring.

We remain committed to continuing to challenge the failure of the Transforming Care agenda. The long called for cross Government approach, now tokenistically and ineffectively adopted, must be challenged based on their own missed targets and lack of investment in community support and services. We will continue to keep 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 leadership, vision and strategic patience, as well as 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. The co-production work we have been leading to develop a Lifelong Action Plan will continue. It will set out what needs to change, what can be built upon and what

needs prioritisation and investment. This will be an overarching framework for activities and a tool for delivering good outcomes and campaigning. Our continuing strategic influencing work will include the following with a particular focus on our four key communities:

- We will build on our regional work to embed valuing and investing in families and will explore ways (subject to funding) to deliver co-production with all stakeholders using the CB NSG national model.
- We plan to review and reflect on the learning from the External Support Group (ESG) work, a CBF led initiative, bringing together a group of senior experienced clinicians and professionals to provide support to local teams who are supporting individuals.
- 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 ensuring best use of limited resources will continue. We will aim to convene a meeting of legal experts to work together to explore the strategic legal challenge options available. 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, explaining the specialist legal support they can access. We will work with the Legal Panel, other charities, advocacy groups and others to share and publicise it. We will also liaise with NHS England and the Department of Health and Social Care to identify opportunities to promote and share the resource through their system processes.
- Reducing the use of restrictive interventions will continue to remain a priority, and it will be taken forward via the multi stakeholder UK wide PR;ERG (Protecting Rights Eliminating Restraint Group) which we convened and chair.
- We will continue to promote the NHS England STOMP and STAMP programmes, which aim to address the inappropriate medication of individuals with learning disabilities and will explore opportunities to take forward further work identified by families, subject to capacity and resources.
- Working with older families we will co-produce a resource to aid proactive and positive planning for the future and will seek funding to progress this area of work.

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. Following our Theory of Change work, we will have a renewed focus on our four key client groups (young families, people in transition, older family carers and families in crisis). We will seek opportunities to enhance our impact measurement to evaluate our impact on an ongoing basis in a way that is robust and useful but proportionate. 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. A General Election will be called in the coming year, and this will impact our work-providing both challenges and opportunities. We will carefully consider how we can maximize the opportunities and minimise the challenges.

Our organisational approach is to arrange our work in a family-centred way, focussed on delivering good outcomes for families at an individual and strategic level. 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 – as 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 – in terms of the needs of the families we support, the financial challenges we will face as a small charity to secure funds for our work and the political upheaval of a General Election. 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 appointed two new Trustees who are family carers. We have a network of Trustee Advisors who are supported, involved, and contribute to the CBF and we are exploring new ways for family carers to input strategically through additional online meetings with Trustees.

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. Having enlisted external expertise and proactively planned for succession for several years, those plans have been implemented since the year-end with a transition to a new Chair of Trustees and the recruitment of a new CEO, who will start in early 2025.

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 a risk management strategy in place, 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. In common with many voluntary organisations, the risks are ongoing due to the nature of the work and the charity context in which we operate.

Currently one of the key risks identified is the transition to a new CEO in the next few months. Actions to mitigate this risk include succession planning, which has been underway for several years, a robust recruitment process and a detailed handover and induction programme for the new CEO. The CBF benefits from having a strong and experienced senior management team and this will help to ensure continuity.

Funding shortfalls continue to represent a major risk especially given the challenging wider financial environment. 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 areas such as reputational risk and suitable mitigating actions are in place. The pandemic highlighted the importance of ensuring that the CBF can respond to national or international-scale incidents that lie beyond our control, and these are now included in our risk register.

Reference and administrative details

Registered Company number

3307407 (England and Wales)

Registered office

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

Registered Charity number

1060714

Trustees

Dr D Allen (Chair since April 2024)
Ms. S Cooper
Mr. J Dodd
Dr N J Gore
Dr K Jankulak (Appointed July 2023)
Ms. D E Lightfoot (Stepped down as Chair April 2024)
Mrs C Million
Mr. A Rook
Mrs K Sangar (Appointed July 2023)

Company Secretary

Mrs C Million

Auditors

Xeinadin Audit Ltd
12 Conqueror Ct
Sittingbourne Kent
ME10 5BH

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.

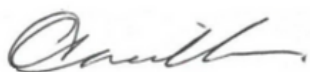
In so far as the trustees are aware:

- 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.

AUDITORS

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

Report of the trustees, incorporating a strategic report, approved by order of the board of trustees as the company directors, on 20th July 2024 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 2024 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 2024 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 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 relating 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 the 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: 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.

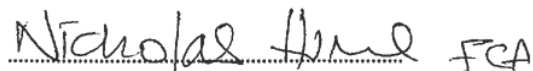
Audit procedures performed by the engagement team included:

- 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.

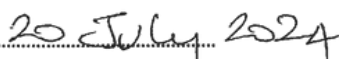
A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at www.frc.org.uk/auditorsresponsibilities. This description forms part of our Report of the Independent Auditors.

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.

 FCA

Nicholas Hume FCA (Senior Statutory Auditor) for and on behalf of Xeinadin Audit Ltd
12 Conqueror Ct Sittingbourne Kent
ME10 5BH

Date: 

Statement for Financial Activities for the Year Ended 31 January 2024

	Notes	General funds £	Designated Funds (Unrestricted) £	Restricted funds £	31.1.24 Total funds £	31.1.23 Total funds restated £
INCOME AND ENDOWMENTS FROM						
Donations and legacies	2	51,806	316,005	177,382	545,193	390,465
Charitable activities	5					
Information and Support		9,349	-	-	9,349	14,425
Strategic Influencing		73,877	-	-	73,877	34,828
Sharing Best Practice		157,122	45,150	-	202,272	89,399
Other trading activities	3	2,187	-	-	2,187	673
Investment income	4	3,230	-	-	3,230	656
Total		<u>297,571</u>	<u>361,155</u>	<u>177,382</u>	<u>836,108</u>	<u>530,446</u>
EXPENDITURE ON						
Raising funds	6	22,507	-	-	22,507	21,140
Charitable activities						
Information and Support	7	75,090	-	18,054	93,144	86,713
Strategic Influencing		49,178	-	67,705	116,883	60,478
Sharing Best Practice		98,267	51,382	91,344	240,993	210,413
Core Funding		97,777	-	-	97,777	144,238
Total		<u>342,819</u>	<u>51,382</u>	<u>177,103</u>	<u>571,304</u>	<u>522,982</u>
NET INCOME/(EXPENDITURE)		(45,248)	309,773	279	264,804	7,464
RECONCILIATION OF FUNDS						
Total funds brought forward		423,251	27,772	126,877	577,900	570,436
TOTAL FUNDS CARRIED FORWARD		<u>378,003</u>	<u>337,545</u>	<u>127,156</u>	<u>842,704</u>	<u>577,900</u>

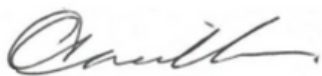
The notes form part of these financial statements

Balance Sheet

31 January 2024

	Notes	General funds £	Designated Funds (Unrestricted) £	Restricted funds £	31.1.24 Total funds £	31.1.23 Total funds £
CURRENT ASSETS						
Debtors	12	21,891	-	-	21,891	26,177
Cash at bank		<u>401,665</u>	<u>345,546</u>	<u>190,470</u>	<u>937,681</u>	<u>687,044</u>
		423,556	345,546	190,470	959,572	713,221
CREDITORS						
Amounts falling due within one year	13	(45,554)	(8,000)	(63,314)	(116,868)	(135,321)
		<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
NET CURRENT ASSETS		<u>378,002</u>	<u>337,546</u>	<u>127,156</u>	<u>842,704</u>	<u>577,900</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		378,002	337,546	127,156	842,704	577,900
		<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>
NET ASSETS		<u>378,002</u>	<u>337,546</u>	<u>127,156</u>	<u>842,704</u>	<u>577,900</u>
FUNDS	14					
General funds					378,002	423,251
Designated Funds					<u>337,546</u>	<u>27,772</u>
Unrestricted Funds Total					715,548	451,023
Restricted funds					<u>127,156</u>	<u>126,877</u>
TOTAL FUNDS					<u>842,704</u>	<u>577,900</u>

The financial statements were approved by the Board of Trustees and authorised for issue on 20th July 2024 and were signed on its behalf by:



.....
Mrs C Million - Trustee

The notes form part of these financial statements

Cash Flow Statement

for the Year Ended 31 January 2024

	Notes	31.1.24 £	31.1.23 £
Cash flows from operating activities			
Cash generated from operations	1	242,561	69,398
Gift Aid		<u>4,846</u>	<u>1,417</u>
Net cash provided by operating activities		<u>247,407</u>	<u>70,815</u>
Cash flows from investing activities			
Interest received		<u>3,230</u>	<u>656</u>
Net cash provided by investing activities		<u>3,230</u>	<u>656</u>
Change in cash and cash equivalents in the reporting period		250,637	71,471
Cash and cash equivalents at the beginning of the reporting period		<u>687,044</u>	<u>615,573</u>
Cash and cash equivalents at the end of the reporting period		<u>937,681</u>	<u>687,044</u>

The notes form part of these financial statements

Notes to the Cash Flow Statement for the Year Ended 31 January 2024

1. RECONCILIATION OF NET INCOME TO NET CASH FLOW FROM OPERATING ACTIVITIES			
	31.1.24		31.1.23
	£		£
Net income for the reporting period (as per the Statement of Financial Activities)	264,804		7,464
Adjustments for:			
Interest received	(3,230)		(656)
Gift Aid Income	(3,744)		(994)
Decrease in debtors	3,184		19,649
(Decrease)/increase in creditors	(18,453)		43,935
Net cash provided by operations	<u>242,561</u>		<u>69,398</u>
2. ANALYSIS OF CHANGES IN NET FUNDS	At 1.2.23	Cash flow	At 31.1.24
	£	£	£
Net cash			
Cash at bank	<u>687,044</u>	<u>250,637</u>	<u>937,681</u>
	<u>687,044</u>	<u>250,637</u>	<u>937,681</u>
Total	<u>687,044</u>	<u>250,637</u>	<u>937,681</u>

The notes form part of these financial statements

Notes to the Financial Statement for the Year Ended 31 January 2024

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.

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.

Continued...

Notes to the Financial Statement – Continued

for the Year Ended 31 January 2024

2. DONATIONS AND LEGACIES

	31.1.24	31.1.23
	£	£
Donations	18,566	20,589
Gift aid	3,744	994
Legacies	316,004	-
Grants	<u>206,879</u>	<u>368,882</u>
	<u>545,193</u>	<u>390,465</u>

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

	31.1.24	31.1.23
	£	£
BBC Children in Need	44,571	-
John Ellerman Foundation	30,000	30,000
Sylvia Adams Charitable Trust	-	5,000
The Stonewall Park Charitable Trust	1,500	1,000
The Esmee Fairbairn Foundation	10,500	32,500
The University of Warwick	-	16,500
National Lottery Community Fund	-	131,291
Pears Family Charitable Foundation	25,000	25,000
Kent Community Foundation	-	3,000
National Health Service England (NHSE) Covid Recovery	-	83,625
The Blagrove Trust	45,508	25,083
Beechwood Trust	-	1,000
Baily Thomas Charitable Fund	10,000	-
Colyer-Fergusson Charitable Trust	14,800	14,883
Paul Hamlyn Foundation	<u>25,000</u>	<u>-</u>
	<u>206,879</u>	<u>368,882</u>

During the year, a review was done to determine the underlying nature of grant funding and as a result, it has been reflected as part of Voluntary Income rather than Charitable Activities.

3. OTHER TRADING ACTIVITIES

	31.1.24	31.1.23
	£	£
Fundraising activities	<u>2,187</u>	<u>673</u>

continued...

Notes to the Financial Statement – Continued for the Year Ended 31 January 2024

4. INVESTMENT INCOME

	31.1.24	31.1.23
	£	£
Deposit account and other interest received	<u>3,230</u>	<u>656</u>

5. INCOME FROM CHARITABLE ACTIVITIES

	Information and Support £	Strategic Influencing £	Sharing Best Practice £	31.1.24 Total activities £	31.1.23 Total activities £
Contract and Other Non Grant Income	<u>9,349</u>	<u>73,877</u>	<u>202,272</u>	<u>285,498</u>	<u>138,652</u>

6. RAISING FUNDS

Raising donations and legacies

	31.1.24	31.1.23
	£	£
Staff costs	22,061	20,853
Fundraising	<u>446</u>	<u>287</u>
	<u>22,507</u>	<u>21,140</u>

7. CHARITABLE ACTIVITIES COSTS

	Direct Costs £	Support costs (see note 8) £	Totals £
Information and Support	93,144	-	93,144
Strategic Influencing	116,883	-	116,883
Sharing Best Practice	240,993	-	240,993
Core Funding	<u>93,558</u>	<u>4,219</u>	<u>97,777</u>
	<u>544,578</u>	<u>4,219</u>	<u>548,797</u>

Sharing Best Practice activities have long been embedded in the core work of the CBF and this year we have invested in formalising this strand of work with a dedicated role employed to lead it. These accounts disclose separate lines for Sharing Best Practice activities within both income from and expenditure on charitable activities. The comparative figures for the year ended 31 January 2023 have been restated to reflect the same breakdown.

continued...

Notes to the Financial Statement – Continued for the Year Ended 31 January 2024

8. SUPPORT COSTS

		Governance costs
		£
Core Funding		<u>4,219</u>

9. NET INCOME/(EXPENDITURE)

Net income/(expenditure) is stated after charging/(crediting):

	31.1.24	31.1.23
	£	£
Auditors' remuneration	<u>2,200</u>	<u>1,355</u>

10. TRUSTEES' REMUNERATION AND BENEFITS

Trustees' expenses

There were no trustees' expenses paid for the year ended 31 January 2024 nor for the year ended 31 January 2023.

Two Trustees received a total of £456 in expenses whilst carrying out voluntary work and sharing lived experience for research, not as part of their role as Trustees.

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.

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:

	2024	2023
Information & Support	5	4
Strategic Influencing	5	5
Sharing Best Practice	3	3
Core/General	6	4
	<u>19</u>	<u>16</u>
Total		
	<u>12</u>	<u>12</u>
Total full time equivalent number of employees		
	<u>12</u>	<u>12</u>

continued...

Notes to the Financial Statement – Continued

for the Year Ended 31 January 2024

12. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.1.24	31.1.23
	£	£
Trade debtors	19,294	17,102
Other debtors	32	657
Gift Aid reclaimable	2,565	3,667
Accrued income	-	4,512
Prepayments	-	239
	<u>21,891</u>	<u>26,177</u>

13. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.1.24	31.1.23
	£	£
Trade creditors	5,299	4,886
Social security and other taxes	6,302	8,457
VAT	3,556	1,359
Funds held for other organisations	15,423	15,423
Accruals and deferred income	86,288	105,196
	<u>116,868</u>	<u>135,321</u>

Funds held for other organisations £15,423 (2023: £15,423) represents monies held by the charity where it is working with other charities on joint projects. At 31 January 2024 these are as follows:

Learning Disability Senate	£12,840
Employment Dissemination	£2,583

continued...

Notes to the Financial Statement – Continued for the Year Ended 31 January 2024

14. MOVEMENT IN FUNDS

	At 1.2.23 £	Net movement in funds £	At 31.1.24 £
Unrestricted funds			
General Funds	423,251	(45,249)	378,002
Training Designated Fund	27,772	(6,230)	21,542
The Jan Seamer Memorial Designated Fund	<u>-</u>	<u>316,004</u>	<u>316,004</u>
	451,023	264,525	715,548
Restricted funds			
John Ellerman Fund	25,335	(934)	24,401
The Esmee Fairbairn Foundation	5,613	(5,613)	-
The National Lottery Community Fund	38,716	(38,716)	-
Baily Thomas Charitable Fund	-	6,000	6,000
CB-NSG	4,197	-	4,197
SHIEC	3,572	-	3,572
Asquith Legacy	3,199	(406)	2,793
National Lottery People's Project	27,395	(7,290)	20,105
Colyer-Fergusson Charitable Trust	1,568	747	2,315
The Blagrove Trust	17,282	6,355	23,637
BBC Children in Need	-	38,386	38,386
Paul Hamlyn Foundation	<u>-</u>	<u>1,750</u>	<u>1,750</u>
	<u>126,877</u>	<u>279</u>	<u>127,156</u>
TOTAL FUNDS	<u>577,900</u>	<u>264,804</u>	<u>842,704</u>

continued...

Notes to the Financial Statement – Continued for the Year Ended 31 January 2024

14. MOVEMENT IN FUNDS – continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General Funds	297,571	(342,820)	(45,249)
Training Designated Fund	45,151	(51,381)	(6,230)
The Jan Seamer Memorial Designated Fund	<u>316,004</u>	<u>-</u>	<u>316,004</u>
	658,726	(394,201)	264,525
Restricted funds			
John Ellerman Fund	30,000	(30,934)	(934)
The Esmee Fairbairn Foundation	7,501	(13,114)	(5,613)
The National Lottery Community Fund	-	(38,716)	(38,716)
Baily Thomas Charitable Fund	10,000	(4,000)	6,000
Asquith Legacy	-	(407)	(407)
National Lottery People's Project	-	(7,290)	(7,290)
Colyer-Fergusson Charitable Trust	14,801	(14,054)	747
The Blagrove Trust	45,508	(39,153)	6,355
BBC Children in Need	44,571	(6,185)	38,386
Paul Hamlyn Foundation	<u>25,000</u>	<u>(23,250)</u>	<u>1,750</u>
	<u>177,382</u>	<u>(177,103)</u>	<u>279</u>
TOTAL FUNDS	<u>836,108</u>	<u>(571,304)</u>	<u>264,804</u>

continued...

Notes to the Financial Statement – Continued for the Year Ended 31 January 2024

14. MOVEMENT IN FUNDS – continued

Comparatives for movement in funds

	At 1.2.22 £	Net movement in funds £	Transfers between funds £	At 31.1.23 £
Unrestricted funds				
General Funds	422,723	27	500	423,251
Training Designated Fund	<u>24,413</u>	<u>3,359</u>	<u>-</u>	<u>27,772</u>
	447,136	3,386	500	451,023
Restricted funds				
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)	-	-
RRISC	978	(478)	(500)	-
Asquith Legacy	3,199	-	-	3,199
National Lottery People's Project	32,650	(5,255)	-	27,395
Colyer-Fergusson Charitable Trust	2,483	(915)	-	1,568
Steele Charitable Trust	20,000	(20,000)	-	-
The Dulverton Trust	5,000	(5,000)	-	-
The Blagrove Trust	<u>-</u>	<u>17,282</u>	<u>-</u>	<u>17,282</u>
	<u>123,300</u>	<u>4,078</u>	<u>(500)</u>	<u>126,877</u>
TOTAL FUNDS	<u>570,436</u>	<u>7,464</u>	<u>-</u>	<u>577,900</u>

continued...

Notes to the Financial Statement – Continued

for the Year Ended 31 January 2024

14. MOVEMENT IN FUNDS – continued

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

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General Funds	167,557	(167,530)	27
Training Designated Fund	<u>42,507</u>	<u>(39,148)</u>	<u>3,359</u>
	210,064	(206,678)	3,386
Restricted funds			
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	-	(477)	(477)
National Lottery People's Project	-	(5,254)	(5,254)
Colyer-Fergusson 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	<u>25,085</u>	<u>(7,803)</u>	<u>17,282</u>
	<u>320,382</u>	<u>(316,304)</u>	<u>4,078</u>
TOTAL FUNDS	<u><u>530,446</u></u>	<u><u>(522,982)</u></u>	<u><u>7,464</u></u>

continued...

Notes to the Financial Statement – Continued

for the Year Ended 31 January 2024

14. MOVEMENT IN FUNDS – continued

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

	At 1.2.22 £	Net movement in funds £	Transfers between funds £	At 31.1.24 £
Unrestricted funds				
General Funds	422,723	(45,222)	500	378,002
Training Designated Fund	24,413	(2,871)	-	21,542
The Jan Seamer Memorial Designated Fund	-	316,004	-	316,004
	447,136	267,911	500	715,548
Restricted funds				
John Ellerman Fund	-	24,401	-	24,401
The Esmee Fairbairn Foundation	9,888	(9,888)	-	-
The National Lottery Community Fund	39,138	(39,138)	-	-
Baily Thomas Charitable Fund	-	6,000	-	6,000
CB-NSG	4,215	(18)	-	4,197
SHIEC	3,572	-	-	3,572
Peoples Postcode Trust	2,177	(2,177)	-	-
RRISC	978	(478)	(500)	-
Asquith Legacy	3,199	(406)	-	2,793
National Lottery People's Project	32,650	(12,545)	-	20,105
Colyer-Fergusson Charitable Trust	2,483	(168)	-	2,315
Steele Charitable Trust	20,000	(20,000)	-	-
The Dulverton Trust	5,000	(5,000)	-	-
The Blagrove Trust	-	23,637	-	23,637
BBC Children in Need	-	38,386	-	38,386
Paul Hamlyn Foundation	-	1,750	-	1,750
	123,300	4,357	(500)	127,156
TOTAL FUNDS	<u>570,436</u>	<u>272,268</u>	<u>-</u>	<u>842,704</u>

continued...

Notes to the Financial Statement – Continued

for the Year Ended 31 January 2024

14. 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 £
Unrestricted funds			
General Funds	465,128	(510,350)	(45,222)
Training Designated Fund	87,658	(90,529)	(2,871)
The Jan Seamer Memorial Designated Fund	<u>316,004</u>	<u>-</u>	<u>316,004</u>
	868,790	(600,879)	267,911
Restricted funds			
John Ellerman Fund	60,000	(35,599)	24,401
The Esmee Fairbairn Foundation	40,002	(49,889)	(9,887)
The National Lottery Community Fund	131,291	(170,429)	(39,138)
Baily Thomas Charitable Fund	10,000	(4,000)	6,000
CB-NSG	-	(18)	(18)
Peoples Postcode Trust	-	(2,177)	(2,177)
RRISC	-	(477)	(477)
Asquith Legacy	-	(407)	(407)
National Lottery People's Project	-	(12,544)	(12,544)
Colyer-Fergusson Charitable Trust	29,684	(29,852)	(168)
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	70,593	(46,956)	23,637
BBC Children in Need	44,571	(6,185)	38,386
Paul Hamlyn Foundation	<u>25,000</u>	<u>(23,250)</u>	<u>1,750</u>
	<u>497,764</u>	<u>(493,407)</u>	<u>4,357</u>
TOTAL FUNDS	<u>1,366,554</u>	<u>(1,094,286)</u>	<u>272,268</u>

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.

The Jan Seamer Memorial Designated Fund is to be used to reflect Jan Seamer's support of the CBF and its work with families, and designated for the specific purposes of promoting the sustainability of the CBF and to fund development opportunities that cannot be funded elsewhere.

continued...

Notes to the Financial Statement – Continued for the Year Ended 31 January 2024

15. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 January 2024.