



## **Bristol Older People's Forum CIO**

Charitable Incorporated Organisation

Charity number: 1162616

## **Annual Report & Accounts**

**1 April 2024 to 31 March 2025**

**Annual Report & Accounts**

1 April 2024 to 31 March 2025

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## Reference and administrative details

**Charity name:** Bristol Older People's Forum CIO

**Registered charity number:** 1162616

**Registered office and operational address:**

The Create Centre, B-Bond Warehouse, Smeaton Road, Bristol, BS1 6XN

### Charity Trustees

The Trustees and officers serving during the year and since the year end were as follows:

Christina Mary Stokes, Chair

Trish Mensah, Deputy Chair

David Elson

Pat Foster

Joanne Goldsworthy Hesketh

Eileen Means

Taramati Mistry

Gloria Morris

Lyn Mitchell Porter

Nigel Varley (appointed 24 October 2024)

### Trustees resigned since 31 March 2024

Judith Irene Brown, BOPF Ambassador (resigned 24 October 2024)

Ismail Yilmaz (resigned 10 October 2024)

### Bankers

Unity Trust Bank, Nine Brindleyplace, Birmingham, B1 2HB

Triodos, Deanery Road, Bristol, BS1 5AS

### Independent Examiner

Rupert Taylor, 5 Mount Pleasant, Millbrook, Torpoint, Cornwall PL10 1BH

### Staff

Yolanda Pot, BOPF Finance & Administration Manager

Ian Patrick Quaife, BOPF Development Manager

Susanna Mackenzie, BOPF Project Coordinator

## **Report of the Trustees for the period 1 April 2024 to 31 March 2025**

The Trustees present its Annual Report and Independent Examiner's Report for the period 1 April 2024 to 31 March 2025.

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standards applicable in the UK and the Republic of Ireland (FRS 102) (effective 1 January 2019) - (Charities SORP (FRS 102)).

### **Objectives and activities**

**The objects of Bristol Older People's Forum CIO are:**

- 1) To promote social inclusion for the public benefit by working with those in the City of Bristol who are socially and economically excluded on the grounds of their age, relieving the needs of such people and supporting their participation in society.
- 2) The relief of poverty and sickness and the preservation and protection of good physical or mental health amongst persons who are in need as a result of their age in the City of Bristol.

**In furtherance of these objects, the Trustees shall:**

- a. Increase, co-ordinate and provide information about opportunities for older members of all of Bristol's communities.
- b. Give older people a voice and facilitate their engagement with service providers, so as to influence the quality and relevance of local services and provisions and so better meet the needs of people over 55.
- c. Research or participate in research into the causes and effects of social exclusion of older people in the city.
- d. Promote activities that support the health and well-being of older people in Bristol.

### **Public Benefit**

The Trustees have had regard to the Charity Commission's guidance on public benefit and endeavour to implement them in all the charity's work. The main activities undertaken to further the charity's objects for the public benefit are detailed in the following pages.

## Achievements and performance

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#### 1. BOPF PROJECTS

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1.5. Feeding Bristol/BOPF Cookbook (BCC Winter Household Support Fund)

1.6. Community Climate Action Project (Bristol Climate and Nature Partnership)

1.7. Bristol Community Festival, 27 March 2025 (BCC)

1.8. Learning and Co-design and Reflective Practice (BCC/UK Shared Prosperity Fund (UKSPF))

1.9. BOPF Research Consultations

#### 1. BOPF PROJECTS

##### Introduction

This has been another busy year for the staff team and trustees, with some new projects to add to our expanding services. As well as this, we have recently moved offices. We are now based at the Create Centre in Smeaton Road (right on the river with views of the Suspension Bridge).

We are now into our final year of a four-year funding cycle from Bristol City Council (The Bristol Impact Fund 2 - BIF2) and we have just completed our application for the next four-year period from April 2026 to March 2030.

Our membership remains consistent at around three thousand members, so we would like to say thank you to all our members for their support and look forward to another year representing older people in Bristol.

## 1.1. BCC Bristol Impact Fund 2

### 1.1.1. BOPF Open Forum Meetings

We have settled on the Triodos Community Foundation venue for our Open Forum meetings. This meets all our health and safety and accessibility requirements. The forum is always well-attended and is an opportunity for members to meet up and have meaningful input on a wide range of issues.

We continue to invite a wide range of speakers as outlined below.

### SPEAKERS at our Open Forum Meetings and AGM

#### 1) BOPF Open Forum 1, 25 April 2024, Triodos Foundation, 43 attendees

- **Silvertime Legal, *Legacy Fortress for Generations***

**David Bayliss, Advisor**

Topics included: wills, trusts and how these can protect your assets, lasting powers of attorney and managing care fees (offering free consultations).

- **BOPF Project Update Report, Ian Quaife, BOPF Development Manager**

- **Bristol Home Library Service, *Bringing the Library to you***

Ken Luxon, Service Manager, **Contact details:** Royal Voluntary Service, [bhlsvisits@royalvoluntaryservice.org.uk](mailto:bhlsvisits@royalvoluntaryservice.org.uk), 0771 4898558

#### 2) BOPF Open Forum 2, 13 June 2024, Triodos Foundation, 35 attendees

- **Ashton Vale Suffragettes Local Bus Campaign**

Ian Quaife, BOPF Development Manager

- **Activist Memories, Trish Mensah, BOPF Deputy Chair**

Trish gave a short talk about a project BOPF is doing with Bristol Radical History Group called " Activists Memories"

- **Homesharing - *a way to make life better***

Ramona Amuza, Director, Homeshare West

Contact details: <https://www.homesharewest.org/> Tel: 0117 369 3045

Covering B&NES, Bristol, North Somerset & South Gloucestershire

Homeshare West is an arrangement for mutual benefit between a Householder and a Homesharer, supported by the Homeshare Co-ordinators

#### 3) BOPF Open Forum 3, 22 August 2024, Broadmead Baptist Church

- This meeting had to be cancelled, due to last minute security notice from the venue.

#### 4) BOPF AGM & Open Forum 4, 24 Oct 2024, Broadmead Baptist Church, 44 attendees

- **BOPF Trustees Standing for Election:**

Trustees standing again: Christina Stokes (Chair), Trish Mensah (Deputy Chair),

David Elson, Pat Foster, Joanne Goldsworthy, Eileen Means, Tara Mistry, Gloria Morris,

Lyn Porter and Nigel Varley.

Vote in favour was unanimously carried forward.

Judith Brown, our BOPF Ambassadors decided to stand down after many years of service.

We would like to thank Judith for all her hard work.

Ismail Yilmaz, our Treasurer also decided to stand down. We would like to thank Ismail for all his hard work over the past year.

- **AbilityNet, Digital Skills Training for Older People**

Lucy Walsh, Trainer for South Wales and the West

For further info: <https://abilitynet.org.uk/BTDigitalSkills>, [enquiries@abilitynet.org.uk](mailto:enquiries@abilitynet.org.uk),

Tel: 0300 180 0028

- **Refugee Welcome Homes (video1 video2)**

Rachael Bee, Director at Refugee Welcome Homes

**Our mission:** all people should have a place to call home.

We want to reduce homelessness for refugees and to help them access accommodation as a first step towards integration in their new life in the uk.

**What do we do?** We link people with a spare room to rent with refugees at risk of homelessness in Bristol and support them both all the way.

- **BOPF Project Update Report**

Ian Quaife, BOPF Development Manager and Suzi Mackenzie, BOPF Project Coordinator

- **Cllr Lorraine Francis, Chair of the Adult & Social Care Committee**

How are we going to serve our population with a shrinking budget?

5) **BOPF Open Forum 5**, 12 December 2024, Sparks Bristol, attendance: 30

- **Community Climate Action Project**

*Rachel Mohun, Senior Coordinator: Community Climate Action Bristol Climate & Nature Partnership*

**Bristol Climate & Nature Partnership**

*Vision: a zero carbon, socially just Bristol where all our communities and nature thrive*  
*Membership organisation (1,300 diverse members), City networking*

- **BOPF Project Update Report**, Ian Quaife, BOPF Development Manager

- **Avon Fire & Rescue Service, Stay safe at home**

Luke Lyons, Crew Manager Community Fire Safety

For further information: <https://www.avonfire.gov.uk> Tel: 0117 926 2061

6) **BOPF Open Forum 6**, 6 February 2025, Triodos Foundation, 37 attendees

- **Temple Quarter Development Update**

Clem Teagle, Head of Communications and Engagement, Bristol Temple Quarter LLP

- **BOPF Project Update Report**, Ian Quaife, BOPF Development Manager

- **The Role of a BOPF Trustee**, Eileen Means, BOPF Trustee

- **Assistive and rehabilitative robotics**, University of Bristol

Prof Jonathan Rossiter, Professor of Robotics is working on developing robotic clothing to help older people maintain independence. **New research project: VIVO - the Active Soft Matter Hub for Enhanced Independent Living.** Jonathan Rossiter, Principal Investigator School of Engineering Mathematics and Technology, Dates 01/12/2024 to 30/11/2030

### **1.1.2. BOPF Challenging Ageism Workshops**

The BOPF on-line Challenging Ageism Workshops have continued successfully throughout 2024/25, with a mix of professional workers and older people. This work is an important part of our drive to challenge all forms of age discrimination and ageist stereotypes.

### **1.1.3. BOPF Meetup Mornings**

The bi-monthly online meetings offered members the chance to explore particular issues with a guest speaker in a smaller group. This year we invited a range of organisations including: Bristol Women's Voice, the Redcross, Avonfire, the Bristol Energy Network and Community Climate Action Project.

### **1.1.4. BOPF Housing Action Group (HAG)**

In the last year, the BOPF HAG group has continued to focus its priorities on fire safety in communal settings and tower blocks. We are now planning to develop a stronger advisory role on housing issues, particularly those affecting older people – with a focus on retrofitting of homes and heat resilience, as set out in our recently published community climate action plan.

### **1.1.5. BOPF Newsletter**

There is always a challenge to find the funding for the newsletter as postage, printing and distribution continue to increase. We are however, committed to producing both a printed copy for our members who are not on-line, and an electronic version. Future issues will also include more articles written by our members.

### **1.1.6. BOPF Representation**

Our staff team and trustees sit on a number of key working and advisory groups and attend many of the consultation and policy making meetings by the local authority, public health, and voluntary sector. Our priority is to ensure that older people are either 'in the room' or represented by the BOPF team and trustees with an aim to influence decisions, and act upon the issues raised by BOPF members.

In the last year we have been working closely with and advising the Temple Quarter team (made up of Bristol City Council (BCC), West of England Combined Authority, Network Rail and the University of Bristol) on accessible public toilets, car-parking, seating, community space, public transport and housing that meet the needs of older people. We have also worked closely with BCC and voluntary partners on plans to improve adult and social care contracts. The emphasis here is to ensure that older and disabled people are part of the policy development.

## **1.2. BOPF Cost of Living and Community Hub Project (Quartet)**

The Cost-of-Living project was funded by the Bristol City Council via Quartet for the period October 2022 to February 2024. BOPF was successful in applying for continuation funding, extending the project until October 2025.

From April 2024 to March 2025 the Project Coordinator worked to broaden out the community hub role to complement and support all BOPF activity, as there are clear links with cost of living/building community resilience and other BOPF projects - such as development of a Community Climate Action Plan. She finished updating website information to align it with this approach. We were pleased to tell members about this at the October Open Forum and AGM. We will work to keep the website aligned with our Open Forum speakers, feedback from members and the community exchange. We take key information and share it through our newsletters and social media.

The community hub digital and in personal outreach activity is increasing engagement with BOPF membership and allowing us to diversify our membership offer with a focus on developing community resilience.

Our close work with Bristol Women's Voice continued, testing new ways of engaging members via an art workshop and with attendance at their annual International Women's Day event at City Hall. Two BOPF trustees ran a workshop exploring how older women can make change happen and we continued the discussion via our stand for the rest of the day. We're excited to continue this work in an advisory role for Bristol Women's Voice's older women's health project over year ahead.

### **1.3. My Music, My Memories and Me! (Quartet)**

Working in partnership with Bristol Beacon, our music club is now embedded into our core service provision. Based in the Terrace room it focusses on participant's favourite music track and their story behind the choice. Lively discussions take place and the chosen music, which ranges from folk to rock to pop and much more, is played, via YouTube on a big screen.

### **1.4. Death Cafes (Awards for All)**

We were successful in applying to Awards for All to run a project titled 'Embracing death, dying and life!' for a year from Dec 2024. A core part of this work involves running death cafes, which have been popular with members in a previous pilot. Two of these took place in February and March, giving members and potential members a chance to talk openly about death and dying.

"I have given consideration to my end of life, but there were practical things I had overlooked, so very helpful" attendee feedback

### **1.5. Feeding Bristol/BOPF Cookbook (BCC Winter Household Support Fund)**

We received funding from Feeding Bristol to print a further 500 copies of the BOPF Cookbook.

As before the cookbooks are popular and great conversation starters with a wide variety of BOPF members or people interested in what BOPF does. They give us the opportunity to talk about food poverty issues, sharing resources available on our website such as the Food bank/club list. They are also part of our ongoing food related work included within the evolving BOPF Community Climate Action plan.

## **1.6. Community Climate Action Project (Bristol Climate and Nature Partnership)**

Over the last year this has been a major piece of work, developed with the BOPF staff team and a core group of older people. The climate action priorities, which include, community engagement, transport, food, homes, energy, and nature were identified by the wider community of older people. The completed plan and summary are available on our website. Going forward, we plan to embed many of the actions into our core programme of work, including the continuation of our panel of climate advisors.

## **1.7. Bristol Community Festival, 27 March 2025 (BCC)**

We received some funding from BCC towards an extra Open Forum. On 27 March we held the Bristol Community Festival Open Forum with 52 attendees.

We commissioned a photographer and created a new display stand showcasing BOPF's work over the last 30 years. The event included lots of discussion, especially on challenging ageism and BOPF's future priorities.

It was great that Councillor Francis attended and participated in the discussion. This led to a further meeting between BOPF's Development Manager and Cllr Francis to discuss ongoing work. An additional benefit from being part of the Community Festival was our Development Manager presenting at the festival closing event. He attended alongside an 'Ashton Vale Suffragette' (BOPF member) and presented learnings from their social action success story.

## **1.8. Learning and Co-design and Reflective Practice (BCC/ UK Shared Prosperity Fund (UKSPF))**

In September our Project Coordinator was part of a co-design group for the first of two city-wide workshops for community hubs. The main outcome was learning from each other about community cohesion challenges, opportunities, strengths and building on this with the great turnout for the final workshop.

Following this she participated in 6 reflective sessions for equity hubs, facilitated by an external organisation. These gave us opportunity to reflect on our work and practices, explore where equity-focused hubs are at this moment in time and share understandings and practices. A summary report of reflections was presented to BCC and shared as part of the second city-wide workshop.

## **1.9. BOPF Research Consultations**

We continue to work with education and policy institutions on research and as advisors, including work with the Centre for Sustainable Energy, ARK West, Climate Action and Nature Partnership and Sirona (Health

## Financial Review

At the end of this financial year there was a total of £31,679 in unrestricted funds (2024 £30,673) and we had a surplus of £1,006 in total unrestricted funds (2024 £2,103). Of the unrestricted funds, £18,000 are designated funds (2024 £18,199) and £13,679 are general funds (2024 £12,474). The total restricted funds carried forward stood at £37,204 (2023 £29,108).

### Going concern

We were successful this year in attracting £91,018 in grants (2024 £95,563), £287 in donations (2024 £302) and £1,970 in charitable trading income (2024 £1615).

This long-term funding, along with careful budgeting and financial management, ensures that BOPF remains a going concern for the foreseeable future.

### Reserves policy

The Trustees have set a policy of maintaining unrestricted reserves equivalent to three months' expenditure. At present there is a designated reserve for an exit strategy of £18,000, which is approximately three months' expenditure. This is reviewed annually.

### Risk management

The Trustees have identified the potential risks to the organisation and ranked them according to likelihood and severity. For each risk they have identified mitigation and a responsible person, and the risk register is reviewed at every regular meeting of the Trustees.

## Structure, Governance and Management

### Governing document

BOPF is a Charitable Incorporated Organisation (CIO) governed by its constitution dated 30 June 2015. It was registered as a CIO on 10<sup>th</sup> July 2015. Anyone over the age of 55 can become a member and on the 31st March 2025, there were 2680 members.

### Organisation

There must be at least 5 charity Trustees and there is no maximum number of charity Trustees that may be appointed to the CIO. The Trustees delegate the day-to-day operations of the charity to the BOPF Development Manager and the BOPF Finance and Administration Manager, in conjunction with the BOPF Chair.

None of the Trustees receive remuneration or other benefit from their work for the charity. Trustees can claim public transport or mileage expenses to Trustee Meetings and Open Forum meetings. Any connection between a Trustee or staff member with a supplier or any other contractual relationship must be disclosed. None were reported this year.

### Trustees

The Trustees continued to meet regularly throughout the year at Trustee Board meetings. The Board, the formal decision-making body, regularly considered a range of reports on, for example, the latest financial position of BOPF including grants updates, the Chair's report and the agendas for future Open Forum meetings. Reports to the Board were also made by the BOPF Development Manager.

As at the end of March 2025, there were 10 Trustees on the Board, including the Chair and Vice-Chair. Induction sessions were provided to new Trustees. Trustees represent BOPF on a wide range of external organisations and bodies, and this is kept under regular review by the Board.

### **Trustee Recruitment Policy**

Bristol Older People's Forum (BOPF) recognises that an effective board of trustees is essential if the charity is to be effective in achieving its objects. The board must seek to be representative of the people whom the charity serves and must have available to it all of the knowledge and skills required to run the charity. Individual trustees must have sufficient knowledge, both of trusteeship in general and of the Charity's activities, to enable them to carry out their role and to represent the Charity at meetings and other events.

When a need has been identified to recruit trustees, a sub-committee will manage the process. This will include the Chair and at least one other trustee together with any other people deemed appropriate by the trustees.

The sub-committee will have responsibility for ensuring that the remainder of the recruitment and induction process are carried out. Responsibility for recruiting trustees will not be delegated to employees although employees may be given specific administrative tasks by the sub-committee.

Before any recruitment process starts the Board of Trustees will undertake an audit of existing members to identify what additional skills and experience are required.

## Trustees' responsibilities in relation to the financial statements

The charity Trustees are responsible for preparing a Trustees' annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England and Wales requires the charity Trustees to prepare financial statements for each year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, of the charity for that period. In preparing the financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the applicable Charities SORP (Statement of Recommended Practice);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures that must be disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011 and the applicable Charities (Accounts and Reports) Regulations. They are also responsible for safeguarding the assets of the charity and taking reasonable steps for the prevention and detection of fraud and other irregularities.

The Trustees confirm that to the best of their knowledge there is no information relevant to the Independent Examination of which the Examiner is unaware. The Trustees also confirm that they have taken all necessary steps to ensure that they themselves are aware of all relevant financial information and that this information has been communicated to the Examiner.

Approved by the Trustees on 31 July 2025 and signed on their behalf by:

 18 / 08 / 2025

Christina Stokes  
BOPF Chair

 18 / 08 / 2025

Trish Mensah  
BOPF Vice-Chair

## **Independent Examiner's Report to the Trustees of Bristol Older People's Forum CIO**

I report to the charity trustees on my examination of the accounts of the above charity for the year ended 31<sup>st</sup> March 2025 which are set out on pages 15 to 25.

### **Responsibilities and basis of report**

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

I report in respect of my examination of the charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

### **Independent examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



28 / 08 / 2025

Rupert Taylor

5 Mount Pleasant, Millbrook, Torpoint, Cornwall PL10 1BH

**STATEMENT OF FINANCIAL ACTIVITIES (SOFA)**

1 April 2024 to 31 March 2025

	Note	Unrestricted funds 2024-25	Restricted funds 2024-25	Total funds 2024-25	Total funds 2023-24
		£	£	£	£
<b>Income</b>					
Donations and legacies	3	287	-	287	302
<b>Charitable activities</b>					
Grants	4	2,000	89,018	91,018	95,563
Charitable trading activities	5	1,970	-	1,970	1,615
<b>Total charitable activities</b>		<b>3,970</b>	<b>89,018</b>	<b>92,988</b>	
Investments	6	403	-	403	334
<b>Total Income</b>		<b>4,660</b>	<b>89,018</b>	<b>93,678</b>	<b>97,814</b>
<b>Expenditure:</b>					
Charitable activities	7	3,654	90,082	93,736	87,615
<b>Total Expenditure</b>		<b>3,654</b>	<b>90,082</b>	<b>93,736</b>	<b>87,615</b>
<b>Net income/expenditure</b>		<b>1,006</b>	<b>(1,064)</b>	<b>(58)</b>	<b>10,198</b>
Transfers between funds		-	-	-	-
<b>Net movement in funds</b>		<b>1,006</b>	<b>(1,064)</b>	<b>(58)</b>	<b>10,198</b>
Total funds brought forward		37,203	30,673	67,877	57,678
<b>Total funds carried forward</b>		<b>38,209</b>	<b>29,610</b>	<b>67,819</b>	<b>67,877</b>



## NOTES TO THE FINANCIAL STATEMENTS

### YEAR ENDED 31 MARCH 2025

#### 1. Accounting Policies

The principle accounting policies adopted, judgements and key sources of estimation uncertainty in the preparation of the financial statements are as follows:

##### a) Basis of preparation

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standards applicable in the UK and the Republic of Ireland (FRS 102) (effective 1 January 2019) - (Charities SORP (FRS 102)).

The Bristol Older People's Forum CIO meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historic cost or transaction value unless otherwise stated in the relevant accounting policy note(s).

##### b) Income

Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the item(s) of income have been met, it is probable that the income will be received and the amount can be measured reliably.

Income from government grants is recognised when the charity has entitlement to the funds, any performance conditions attached to the grant have been met, it is probable that the income will be received and the amount can be measured reliably and is not deferred.

##### c) Interest receivable

Interest on funds held on deposit is included when receivable.

##### d) Fund accounting

- i. Unrestricted funds are available for use at the discretion of the Trustees in furtherance of any of the purposes of the charity.
- ii. Designated funds are unrestricted funds of the charity which the Trustees have decided at their discretion to set aside to use for a specific purpose.
- iii. Restricted funds are donations which the donor has specified are to be solely used for particular purposes.

##### e) Expenditure

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that the settlement will be required and the amount of the obligation can be measured reliably.

Expenditure on charitable activities includes the costs: to maintain our membership, to carry out the survey, to produce the BOPF Newsletters, for Open Forum meetings to further the purposes of the charity and their associated support costs.

Other expenditure represents those items not falling into any other heading.

**f) Allocation of support costs**

Support costs are those functions that assist the work of the charity but do not directly undertake charitable activities. Support costs include governance, office costs, budgeting and accounts, payroll administration, information technology and human resources which supports BOPF's charitable activities. These costs have been allocated between costs of raising funds and expenditure on charitable activities. The bases on which support costs have been allocated are set out in note 8.

**g) Tangible fixed assets**

Individual fixed assets costing £1000 or more are capitalised at historic cost and depreciated over their estimate useful economic life on a straight-line basis as follows:  
IT equipment: annual rate 33%

**h) Debtors**

Trade and other debtors are recognised at the settlement due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

**i) Cash at bank and in hand**

The Triodos deposit account has instant access.

**j) Creditors and provisions**

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

**k) Pensions**

BOPF's automatic enrolment staging date was on 1 March 2016. BOPF chose NEST to process auto enrolment. One part-time employee opted into the scheme.

**2. Legal status of the charity**

BOPF is a Charitable Incorporated Organisation (CIO). In the event of the charity being wound up the trustees have no liability for its debts.

**3. Income from donations**

<b>Gifts and donations</b>	<b>2025 (all unrestricted)</b>	<b>2024 (all unrestricted) £</b>
Website donations	25	10
Newsletter donations	-	-
Open Forum donations	172	164
Other Donations	90	128
<b>Total Gifts &amp; donations</b>	<b>287</b>	<b>302</b>

**4. Income from charitable activities: grants**

<b>Grants</b>	<b>2025 £</b>	<b>2024 £</b>
BCC Bristol Impact Fund 2	49,868	49,419
BIF2 10% Uplift - Oct23-Sept25	-	9,974
BIF2 Steering Group - Nov23-Oct24	-	450
St Monica Trust	-	500
Feeding Bristol (BOPF Cookbook)	2,000	5,400
John James Bristol Foundation	-	820
Quartet_BCC Cost of Living	25,000	25,000
Quartet - Vinyl Record Club	-	4,000
Community Climate Action	6,750	-
Awards for All - Death Cafes	4,860	-
UK Shared Prosperity Fund (UKSPF) Learning and Co-design (Small Grants Fund)	525	-
UKSPF Reflective Practice (Small Grants Fund)	525	-
Winter Household Support Fund 2024 - Grant 2 Award Feeding Bristol (BOPF Cookbook reprint)	990	-
BCC Bristol Community Festival event, 270325	500	-
Fixed asset reserve	-	-
<b>Total</b>	<b>91,018</b>	<b>95,563</b>

**5. Income from charitable activities: trading income**

<b>Income from other trading activities</b>	<b>2025</b>	<b>2024</b>
Newsletter adverts	600	-
BOPF Consultancy	1370	1,615
<b>Total</b>	<b>1,970</b>	<b>1,615</b>

**6. Investment income**

Investment income of £403 is interest received from the Triodos deposit account.

## 7. Analysis on expenditure on charitable activities

### 1 April 2024 - 31 March 2025

	Basis of apportionment	Total Unrestricted	Total Restricted	Total 2024 -25	Total 2023 -24
<b>Direct costs</b>					
Salaries, NI & pension	75% of staff time	407	56,505	<b>56,912</b>	50,996
Freelance fees		124	446	<b>570</b>	4,600
Staff expenses		8	359	<b>366</b>	311
Newsletter		2,780	1,586	<b>4,366</b>	-
Venue costs		-	892	<b>892</b>	1,568
Event/Project costs		199	1,687	<b>1,886</b>	2,916
Communications costs		-	990	<b>990</b>	1,986
<b>Total direct costs</b>		3,519	62,464	<b>65,983</b>	62,377
<b>Support costs</b>					
Salaries	25% of staff time	136	18,835	<b>18,971</b>	16,999
Other staff costs (CPD, DBS, training, recruitment)		-	403	<b>403</b>	310
Insurance		-	541	<b>541</b>	481
Rent		-	4,492	<b>4,492</b>	4,492
Telephone		-	557	<b>557</b>	510
Bank charges		-	71	<b>71</b>	72
Printing		-	-	<b>-</b>	294
Postage		-	2	<b>2</b>	4
Stationary		-	116	<b>116</b>	-
IT Hardware		-	358	<b>358</b>	42
IT Maintenance		-	291	<b>291</b>	661
IT website (domain & hosting)		-	206	<b>206</b>	-
IT Software		-	134	<b>134</b>	112
Independent Examination		-	180	<b>180</b>	180
Info Commissioners Office (ICO)		-	47	<b>47</b>	40
Trustee expenses		-	152	<b>152</b>	84
Trustee training		-	55	<b>55</b>	-
Trustee meetings venue hire		-	113	<b>113</b>	-
Trustee thank yous		-	26	<b>26</b>	-
Membership (Voscur, NPC)		-	78	<b>78</b>	-
Depreciation		-	959	<b>959</b>	958
<b>Total support costs</b>		136	27,617	<b>27,753</b>	25,238
<b>Total charitable activity costs</b>		3,654	90,082	<b>93,736</b>	87,615

The charity identifies the costs of its support functions, which are apportioned between its charitable activities undertaken in the year.

## 8. Analysis of staff costs and trustee remuneration and expenses

	Unrestricted funds 2024-25 £	Restricted funds 2024-25 £	Total funds 2024-25	Total funds 2023-24 £
Salaries	543	72,411	72,954	66,201
Social Security costs	-	1,302	1,302	370
NEST Pension contributions	-	1,627	1,627	1,424
<b>Total staff costs</b>	<b>543</b>	<b>75,340</b>	<b>75,883</b>	<b>67,995</b>

No employees had employee benefits in excess of £60,000 (2024 none). Pension costs are allocated to activities in proportion to related restricted staffing costs incurred.

None of the Trustees have been paid any remuneration or received any other benefits from an employment with the charity.

Two Trustees received £152 for travel expenses for the furtherance of the CIO's charitable objects during the year (2023-24 £84 to one trustee).

There were no other related party transactions during the year.

## 9. Staff numbers

The average head count (number of staff employed) over the course of the year was 3 staff (2024 3). This equates to an average of 2.5 full-time member of staff (2024 2.5).

## 10. Government Grants

Income from government grants are performance related grants made by the Bristol local authority to fund addressing inequality, and engaging and informing older people in Bristol. The total of such grants in 2024-25 was £49,868 (2023-24 £59,843)

## 11. Tangible fixed assets

	IT equipment	Total
<b>Cost:</b>	£	£
As at 1 April 2024	2,875	<b>2,875</b>
Additions	-	-
Disposals	-	-
As at 31 March 2025	-	-
<b>Depreciation</b>		
As at 1 April 2024	1916	<b>1916</b>
Charge for the year	959	<b>959</b>
Eliminated on disposals	-	-
As at 31 March 2025	-	-
<b>Net book value as at 31 March 2025</b>	-	-
Net book value as at 31 March 2024	959	<b>959</b>

**12. Debtors**

	2025	2024
Sundry debtors	-	-
<b>Total</b>	<b>-</b>	<b>-</b>

**13. Creditors: amount falling due within one year**

	2025	2024
Accruals	180	180
<b>Total</b>	<b>180</b>	<b>180</b>

**14. Analysis of movements in unrestricted funds**

	Balance 1 Apr 2024	Incoming resources	Resources expended	Transfers	Funds at 31 Mar 2025
	£	£	£	£	£
General fund	12,474	2,660	1,455	-	<b>13,679</b>
Designated funds		-	-	-	-
Contingency fund	18,000	-	-		<b>18,000</b>
Feeding Bristol (BOPF Cookbook)	-	2,000	2,000	-	-
John James Bristol Foundation	199	-	199		-
<b>Total designated funds</b>	<b>18,199</b>	<b>2,000</b>	<b>2,199</b>	<b>-</b>	<b>18,000</b>
<b>Total</b>	<b>30,673</b>	<b>4,660</b>	<b>3,654</b>	<b>-</b>	<b>31,679</b>

	Balance 1 Apr 2023	Incoming resources	Resources expended	Transfers	Funds at 31 Mar 2024
	£	£	£	£	£
General fund	10,570	2,251	347	-	<b>12,474</b>
Designated funds					
Contingency fund	18,000	-	-	-	<b>18,000</b>
Feeding Bristol (BOPF Cookbook)	-	5,400	5,400	-	-
John James Bristol Foundation	-	820	621	-	<b>199</b>
<b>Total designated funds</b>	<b>18,000</b>	<b>6,220</b>	<b>6,021</b>	<b>-</b>	<b>18,199</b>
<b>Total</b>	<b>28,570</b>	<b>8,471</b>	<b>6,368</b>	<b>-</b>	<b>30,673</b>

**General fund:** The 'free reserve' after allowing for all designated funds.

**Contingency fund:** Calculated as three months running costs, in accordance with the charity's Reserves Policy.

**15. Analysis of movements in restricted funds**

	Balance 1 Apr 2024	Incoming resources	Resources expended	Transfers	Funds at 31 Mar 2025
	£	£	£	£	£
BCC Bristol Impact Fund 2	2,005	49,868	49,905	-	1,968
BIF2 10% Uplift	9,974	-	-	-	9,974
BIF2 Steering Group	450	-	144	-	306
Bristol Harbour Festival 2022	1,516	-	1,516	-	-
Quartet BCC Cost of Living Yr2	19,270	25,000	26,206	-	18,064
Quartet - Vinyl Record Club	2,585	-	2,585	-	-
AwardsForAll_Platform60	446	-	446	-	-
Community Climate Action	-	6,750	4,715	-	2,035
Awards for All - Death Cafes	-	4,860	1,260	-	3,600
UKSPF Learning and Co-design (Small Grants Fund)	-	525	525	-	-
UKSPF Reflective Practice (Small Grants Fund)	-	525	525	-	-
Winter Household Support Fund 2024 - Grant 2 Award Feeding Bristol (BOPF Cookbook reprint)	-	990	990	-	-
BCC Bristol Community Festival 270325	-	500	307	-	193
Fixed asset reserve	959	-	959	-	-
<b>Total</b>	<b>37,204</b>	<b>89,018</b>	<b>90,082</b>	<b>-</b>	<b>36,140</b>

**Previous year comparison: movements in Restricted Funds 2023-24**

	Balance 1 Apr 2023	Incoming resources	Resources expended	Transfers	Funds at 31 Mar 2024
	£	£	£	£	£
BCC Bristol Impact Fund 2	1,070	49,419	48,484	-	2,005
BIF2 10% Uplift - Oct23-Sept25	-	9,974	-	-	9,974
BIF2 Steering Group - Nov23-Oct24	-	450	-	-	450
St Monica Trust	-	500	500	-	-
Bristol Harbour Festival 2022	1,516	-	-	-	1,516
Quartet - BCC Cost of Living Yr1	17,095	-	17,095	-	-
Quartet - BCC Cost of Living Yr2	-	25,000	5,730	-	19,270
Quartet - Vinyl Record Club	-	4,000	1,416	-	2,585
AwardsForAll_Platform60	7,511	-	7,064	-	446
Fixed asset reserve	1,917	-	958	-	959
<b>Total</b>	<b>29,108</b>	<b>89,343</b>	<b>81,247</b>	<b>-</b>	<b>37,204</b>

## **Purpose of Restricted Funds**

### **BCC Bristol Impact Fund 2**

Core funding from the Bristol City Council to deliver our key services.

The goal of the second round of Bristol Impact Fund is to grow the power of local communities that experience the greatest inequality.

### **BIF2 10% Uplift - Oct23-Sept25**

Grant from BCC in recognition of the pressure that the rise in cost-of-living has placed on VCSE organisation over the last year and the impact that has on the ability to deliver Bristol Impact Fund 2 (BIF2) grant funded activities.

### **BIF2 Steering Group**

Role and Purpose of the Steering Group:

- To shape the Monitoring, Evaluation and Learning (MEL) programme and grant management over the life of BIF2, making sure that the grantee voice is part of all decision-making, reflecting the full diversity of projects funded under BIF2.
- To take part in co-designing and co-leading the MEL programme and grant management activities.
- To act as a sounding board/ critical friend; ensuring the MEL programme is helpful and meaningful to grantees.

**Awards For All (Platform60)** - funding for the design and development of the Platform60 website. <https://platform60.org.uk>

**BCC Cost of Living Community Hubs (Quartet)** - funding for the Cost-of-Living part-time Project Worker post to develop a range of cost-of-living support measures, working with older people.

**The Household Support Fund (HSF)** is a series of local government funds provided by the Department for Work and Pensions (DWP). It supports vulnerable households with the rising cost of living and providing support with food is a key part of this.

### **Quartet - Vinyl Record Club - The Express Grant Programme**

The development of our Vinyl Record Club will include on-line and in-person outreach meetings. To deliver an innovative and creative new service to improve well-being and address social-isolation.

**Bristol Harbour Festival** - arts-based project to develop a more diverse involvement and attendance at the harbourside festival. Funding available to develop a further art-based project with older people.

### **Community Climate Action**

To develop a Bristol Older People's Community Climate Action Plan 2025

### **Awards for All - Death Cafes**

We would like to employ a Wellbeing Facilitator to support Bristol Older People's Forum (BOPF) members with practical and emotional support and signposting around death and dying. The facilitator will organise, deliver and share learning from 6x Death Cafes in central Bristol over the duration of a twelve-month project, aiming for c.12 people per session.

**UKSPF Learning and Co-design (Small Grants Fund)**

The Funded Activities entail full participation in two half-day UKSPF Learning and Co-design workshops to take place before 31st March 2025, as well as the co-design of one workshop.

**UKSPF Reflective Practice (Small Grants Fund)**

The Funded Activities entail full participation to the best of your ability in seven half-day Reflective Practice sessions to take place before 31st March 2025.

**BCC Bristol Community Festival, 270325**

The event will be a special edition of the Open Forums that Bristol Older People's Forum members attend. This extra funding will give us the opportunity to run an Open Forum focused on member experience and best practice. Members will be invited to share experiences, learning and promote opportunities related to current BOPF activity, such as the Community Climate Action project, Older Women's Space, Music and Memories, Public Transport and Housing Action.

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