# Bristol Older People's Forum CIO

Charitable Incorporated Organisation

Charity number: 1162616

# Annual Report & Accounts

**1 April 2025 to 31 March 2026**

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**Annual Report & Accounts**

1 April 2025 to 31 March 2026

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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
Shelley Margaret Lanchbury, Deputy Chair (appointed 31 July 2025)
Helena Milton-Thompson, Treasurer (appointed 31 July 2025)
David Robert Elson
Pat Foster
Joanne Goldsworthy Hesketh
David Jepson (appointed 31 July 2025)
Eileen Means
Trish Mensah
Taramati Mistry
Gloria Morris
Lyn Mitchell Porter
Nigel Geoffrey Varley

**Trustees resigned since 31 March 2025**
No trustees resigned this year.

**Bankers**
Unity Trust Bank plc, Four Brindleyplace, Birmingham, B1 2JB
Triodos, Deanery Road, Bristol, BS1 5AS

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

**Staff**
Ian Patrick Quaife, BOPF Director
Yolanda Pot, BOPF Finance & Administration Manager
Susanna Mackenzie, BOPF Project Coordinator
Annali Grimes, BOPF Project Worker
Lauren Hinks, BOPF Project Support Worker



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## Report of the Trustees for the period 1 April 2025 to 31 March 2026

The Trustees present its Annual Report and Independent Examiner's Report for the period 1 April 2025 to 31 March 2026.

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.



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# Achievements and performance

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## 1. BOPF PROJECTS

### Introduction

All our work is based on a 'social empowerment' model of age. We also use a community development approach, which ensures that older people are at the centre of our activities and projects. Central to this is a commitment to challenging ageism and age discrimination and ensuring the voices of older people are heard and can influence policy and decision-making. It is important to challenge exclusionary practice, where older adults are seen as passive recipients of services. We also challenge divisions that often exist in public life and look for common ground between people and generations.

We are pioneers in our work with older people, placing creativity and innovation as core principles. We will always ask difficult questions, challenge ageist practices, and work to take people with us.



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Although age is a protected characteristic under the Equality Act 2010, age discrimination remains embedded in everyday interactions with older people. We continue to challenge this through our professional practice.

This year has been one of growth and change as we expanded our activities and increased our staff team. We also secured four more years of core funding through a successful application to the council's Bristol Impact Fund (BIF).

Our membership and network of supporters have remained strong at over 2,600. We would like to thank all our members for their continued support and look forward to another year of representing and working alongside older people in Bristol.

## 1.1. BCC Bristol Impact Fund 2

### 1.1.1. BOPF Open Forum Meetings

BOPF's Open Forum meetings have been established for many years, bringing older people together to discuss issues of concern with guest speakers and the BOPF staff team. The meetings are now based at the accessible Triodos Foundation venue near Bristol Central Library, providing a city-centre location.

### SPEAKERS at our Open Forum Meetings and AGM

1) **BOPF Open Forum 1**, 1 May 2025, Triodos Foundation, 30 attendees
   - **David Jepson,** Consultant in local economic development and Director of Employability Edge Ltd**. How will older people engage in the local economy and labour market in the future?**
   - **BOPF Project update,** Ian Quaife, BOPF Development Manager
   - **Alzheimer's Society,** Wendy Stephens, Time for Dementia Programme

2) **BOPF Open Forum 2**, 19 June 2025, Triodos Foundation, 36 attendees
   - **Temple Quarter Development Update,** Jane Greenaway, Bristol Temple Quarter LLP
   - **BOPF Project update**, Ian Quaife, BOPF Development Manager
   - **Divine Ceremony,** Dee Ryding, founder, **Talking about death. Why I started a funeral business**

3) **BOPF Open Forum 3**, 14 August 2025, Triodos Foundation, 37 attendees
   - **BCC City Transport - Update on Transport Schemes in the City**
     Darron Hamilton, Principal Transport Officer and Martin Chittell, Community Engagement Officer in the Engagement & Active Travel Team
   - **Marmalade Trust, Work around loneliness in Bristol,** Xanne Carey, Operations Manager
   - **BOPF Project update**, Ian Quaife, BOPF Development Manager
   - **Dogs for Good - We bring people and dogs together to help make life possible in so many extraordinary ways,** Emma Gwynne, Community Engagement Officer



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4) **BOPF AGM & Open Forum 4**, 30 Oct 2025, Triodos Foundation, 50 attendees
   - **BOPF Trustees Standing for Election:**
     **Trustees standing again:** Christina Stokes, Chair (CS),
     Trish Mensah, Deputy Chair (TSM), David Elson (DE), Pat Foster (PF),
     Joanne Goldsworthy (JG), Eileen Means (EM), Gloria Morris (GM), Tara Mistry (TM), Lyn Porter (LP), Nigel Varley (NV)
     **Co-opted Trustees:** Helena Milton-Thompson, Treasurer (HT), Norma Innes (NI),
     David Jepson (DJ), Shelley Lanchbury (SL)
     Vote in favour was unanimously carried forward.
   - **Cllr Tony Dyer,** Leader of the Council
     **Hugh Evans,** Executive Director of Adults and Communities
     **Cllr Lorraine Francis,** Chair of Adult Social Care Policy Committee
   - **BOPF Project update**, Ian Quaife, BOPF Development Manager
   - **Neil Maggs, BOPF Food Educators Project**

5) **BOPF Open Forum 5,** 11 December 2025, Triodos Foundation, 43 attendees
   - **Prostate Disease Awareness**
     Prospect - Bristol and District Prostate Cancer Support Group, Tim Bond, Chair
   - **Mayor of West of England Combined Authority (WECA), Helen Godwin**
     Unfortunately, Helen Godwin was ill and couldn't attend, so, **Ian and Suzi** lead a **'Questions to the WECA* Mayor' session.** In Helen's absence the questions raised were passed to her office and responses received were circulated
   - **BOPF Project Update Report,** Ian Quaife, BOPF Director

6) **BOPF Open Forum 6,** 12 February 2026, Triodos Foundation, 43 attendees
   - **Mayor of West of England Combined Authority (WECA)**
     **Helen Godwin -** Buses and Bus Services, Rail, Employment and Older Workers, Housing and Infrastructure, Transport Infrastructure.
   - **BOPF Project Update Report,** Ian Quaife, BOPF Director
   - **Robins Foundation, Bristol City Football Club**
     Projects for adults and over 55s: walking football and a dementia-friendly Bristol City café

### 1.1.2. BOPF Challenging Ageism Workshops

The BOPF online Challenging Ageism workshops continued successfully throughout 2025/26, bringing together a mix of professionals and older people. They remain an important part of our ongoing work to challenge age discrimination and ageist stereotypes. We have also introduced a shorter online e-learning module, aimed particularly at people who work directly with older people.

### 1.1.3. My Music, My Memories and Me!

Working in partnership with Bristol Beacon, the BOPF Music Club is now well established. Based in the Terrace Room, each session focuses on a music track chosen by a participant and the story behind their choice. This leads to lively discussion, with music ranging from



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folk and rock to pop and many other genres, played via YouTube on a big screen. We have a core group of regulars and are always keen to welcome new participants.

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

During the year, the BOPF HAG group has continued to focus on issues affecting older people. Our work has included fire safety and housing repairs, with an increasing focus on council housing. We now have a formal role on the council's Housing Engagement Panel, giving us a seat at the table to raise issues with senior managers, elected councillors and tenants. Problems with the council's new IT system and delays to repairs have been key concerns, along with fire safety in communal areas and tower blocks.

The group has a core membership of around ten older people, all with professional or lived experience of housing issues. We meet bi-monthly online, and new older people with an interest in housing are welcome

### 1.1.5. BOPF Newsletter and e-Bulletin

Through our BIF core funding, we now have funding to continue our quarterly newsletter. The printed version is important for keeping members who are not online up to date with our activities. We also encourage members to contribute articles, particularly on issues affecting older people.

We have also introduced a regular e-bulletin, providing up-to-date news and information from the BOPF team.

### 1.1.6. BOPF Consultations, Research and Advisory Role

This year we have continued to work with education and policy institutions on research, receiving many requests from academics and students. We prioritise collaborations where research can support policy change and provide insight into health and other issues affecting people as they age, and we aim to fit these into our wider programme of work.

We continue to act as advisers on a range of council and voluntary sector groups. These include the BCC Adult & Social Care Equalities Group, the BCC Co-Production Disability Advisory Group (focused on involving people in the design and development of projects), the Temple Meads Regeneration Equality Advisory Group, the Transport Equality Group and the Age Friendly Development Group, among others.

We also work with members on a one-to-one basis, as advocates or, if we can't deal directly with a particular issue, signposting people on to specific services.

### 1.1.7. BOPF Representation

Our staff team, trustees and members take part in a range of working groups, advisory groups and consultation meetings with the local authority, Public Health and voluntary sector organisations. Our priority is to ensure that older people are either directly involved or represented by BOPF, so their views help inform policy and decision-making and reflect the issues raised by our members.

During the past year, we have continued to work with the Temple Quarter team (Bristol



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City Council, the West of England Combined Authority, Network Rail and the University of Bristol) on issues including accessible public toilets, parking, seating, community space, public transport and housing for older people. We have also worked with Bristol City Council and voluntary sector partners on plans to improve adult social care contracts, with an emphasis on involving older and disabled people in policy development. In addition, we have advised on the council's housing hate crime policy, ensuring it includes age as a basis for a hate crime.

Our Director, Ian Quaife, now sits on the One City Transport Board and the council's Housing Engagement Panel and the Regional Climate and Nature Partnership, giving BOPF a stronger voice in transport, housing and wider local decision-making.

## 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 2025 to October 2025 the Project Coordinator continued work to broaden out the community hub role to complement and support all BOPF activity, including organising a spring social, co-presenting Challenging Ageism Workshops and carrying out a review of overall member communications activity. This led to the introduction of a new e-bulletin in early 2026.

The Project Coordinator continued to attend the useful bi-weekly community exchange meetings. She also attended various intergenerational or older people's community events promoting BOPF's aims, resources and sharing activity with sector peers.

Our attendance at International Women's Day 2026 was an opportunity to attract new BOPF members and gather insights (through an interactive activity designed and delivered by BOPF Climate Action Plan steering group members) to benefit the new Nature Together project starting in 2026.

## 1.3. Community Climate and Nature Action Plan (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.

## 1.4. Community Climate and Nature Action Network

To test and scale up the successful Community Climate Action model, moving from the urban area of Bristol out to the diverse West of England (WoE), testing the model's future replicability across the rest of the UK.



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## 1.5. Nature Together

This year, we were successful in our funding bid for the Nature Together project. This is a two-year programme to address nature decline across the city and involve more older people in nature-based activities. We are one of three organisations selected for this work, funded through The National Lottery Heritage Fund and Bristol City Council.

The project began in February 2026 and we have employed two part-time project workers, Annali and Lauren, who are leading the work alongside an advisory group of older people. So far, we have run two nature walks in local parks and begun work on improving green spaces around high-rise blocks.

This work is an extension of our Community Climate and Nature action plan, established last year and ensures that older people have a key role in climate and nature action.

## 1.6. Death Cafes (Awards for All)

We ran death cafes with 36 people attending 6 sessions over the duration of the project 'Embracing death, dying and life!' funded by Awards for All (Dec 2024-Nov 2025)

Examples of attendee feedback:

> "A great discussion around death and dying and various cultural ways of honouring the dead"
> "Always interesting to hear what others have to say and share experiences"
> "Good to have a small number which made for lively debate, very relaxed."
> "Natural, friendly even though about death. We're here as we are."

As part of the project, we invited an independent funeral provider 'Divine Ceremony' to speak and lead an interesting discussion at an Open Forum. This was received positively by members in attendance

> "Fantastic talk, very thought provoking. Make sure provisions are made. Use local undertakers. Well worthwhile talk."

Divine Ceremony also wrote a piece for the newsletter. We created a new information section on the website, with information about death and dying, shaped around information shared informally in the death cafes.

It was decided that because they offer a unique space for reflection and conversations about an important topic, death cafes would continue into 2026 as part of BIF work, our first café taking place in March at a new central venue.

## 1.7. BOPF Food Film (Household Support Fund)

We launched "Lunch – A Chat with Older People", a short film exploring the lives of six older adults and their relationship with food. The film covers food and health, changing diets as we age, food and identity and culture, and how people cook or do not cook.

The launch was held at the Create Centre Theatre with sixty people in attendance, followed by a Q&A session with participants and filmmaker Neil Maggs. We plan to take



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the film and discussion out to community groups, as well as making it available on YouTube.

## 1.8. BWV & BOPF over 55s Health Project

Our work with women aged 55+ in partnership with Bristol Women's Voice expanded into a People's Health Trust funded project focused on health inequalities (funded for 2 years from April 2025). BOPF played an advisory and supportive role to this work.

During Year 1, the project brought together women aged 55+ to explore health discrimination, build leadership skills, and develop a shared campaign to improve health outcomes for older women in Bristol.

Key achievements included strong partnership working and regular co-production meetings to ensure women's voices shaped all activities and decisions. Workshops that increased understanding of sexism, misogyny, ageism, and discrimination in healthcare.

During Year 2, two key campaign priorities were identified to be developed with focused activity: Better GP training in women's health for women over 55 and tackling sexism and ageism in healthcare.

## 1.9. Housing Resident & Community Panel

We now have a formal role on the council's Housing Engagement Panel, giving us a seat at the table to raise issues with senior managers, elected councillors and tenants. See also item 1.1.4. BOPF Housing Action Group (HAG).

## 1.10. Equity Hub Community Access Partnership

This is a developing piece of work aimed at building a network between organisations with similar or overlapping services. Partners include the Bristol Disability Equality Forum (BDEC), the Somali Advice Centre and Alive Activities.



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# Financial Review

At the end of this financial year there was a total of £35,029 in unrestricted funds (2025 £31,679) and we had a surplus of £3,351 in total unrestricted funds (2025 £1,006). Of the unrestricted funds, £18,932 are designated funds (2025 £18,000) and £16,098 are general funds (2025 £13,679). The total restricted funds carried forward stood at £56,254 (2025 £36,140).

### Going concern

We were successful this year in attracting £122,311 in grants (2024 £91,018), £836 in donations (2025 £287) and £1,975 in charitable trading income (2025 £1970).

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 10th July 2015. Anyone over the age of 55 can become a member and on the 31st March 2026, there were 2632 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 Director 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 milage 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 grant updates, the Chair's report and the agendas for future Open Forum meetings. Reports to the Board were also made by the BOPF Director.

As at the end of March 2026, there were 13 Trustees on the Board, including the Chair and Vice-



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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 is 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.



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## 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 16 July 2026 and signed on their behalf by:

Christina Stokes 06 / 08 / 2026

Christina Stokes
BOPF Chair

Helena Milton-Thompson 03 / 08 / 2026

Helena Milton-Thompson
BOPF Treasurer



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# 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 31st March 2026 which are set out on pages 16 to 26.

**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.



07 / 08 / 2026

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



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## STATEMENT OF FINANCIAL ACTIVITIES (SOFA)

1 April 2025 to 31 March 2026

| | Note | Unrestricted funds 2025-26 | Restricted funds 2025-26 | Total funds 2025-26 | Total funds 2024-25 |
|---|---|---|---|---|---|
| | | £ | £ | £ | £ |
| **Income** | | | | | |
| **Donations and legacies** | 3 | 836 | - | 836 | 287 |
| **Charitable activities** | | | | | |
| **Grants** | 4 | 2520 | 119,791 | 122,311 | 91,018 |
| **Charitable trading activities** | 5 | 1,975 | - | 1,975 | 1,970 |
| **Total charitable activities** | | 4,495 | 119,791 | 124,286 | 92,988 |
| **Investments** | 6 | 275 | - | 275 | 403 |
| **Total Income** | | 5,606 | 119,791 | 125,397 | **93,678** |
| **Expenditure:** | | | | | |
| **Charitable activities** | 7 | 2,255 | 99,677 | 101,932 | **93,736** |
| **Total Expenditure** | | 2,255 | 99,677 | 101,932 | **93,736** |
| **Net income/expenditure** | | 3,351 | 20,114 | 23,464 | **(58)** |
| **Transfers between funds** | | - | - | - | - |
| **Net movement in funds** | | 3,351 | 20,114 | 23,464 | (58) |
| Total funds brought forward | | 31,679 | 36,140 | 67,819 | 67,877 |
| **Total funds carried forward** | | 35,029 | 56,254 | 91,283 | **67,819** |



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**BALANCE SHEET**

31 March 2026

**Balance Sheet**

| Note ref. | | | Total funds 31 Mar 2026 | Total funds 31 Mar 2025 |
|---|---|---|---|---|
| | | | £ | £ |
| | **Fixed assets:** | | | |
| 11 | Tangible assets | | | |
| | Net book value | - | - | - |
| | *Total fixed assets* | - | - | - |
| | **Current assets:** | | | |
| 12 | **Debtors** | | - | - |
| | **Cash at bank and in hand** | | | |
| | Unity Trust Bank | | 72,811 | 47,177 |
| | Triodos bank | | 21,025 | 20,750 |
| | PayPal | | 54 | 54 |
| | Petty cash | | 151 | 18 |
| | *Total current assets* | | 94,040 | 67,999 |
| | **Liabilities:** | | | |
| 13 | Creditors: Amounts falling due within one year | | 2,757 | 180 |
| | Prepaid Income | | - | - |
| | **Total current liabilities** | | 2,757 | 180 |
| | *Net current assets* | | 91,283 | 67,819 |
| | *Total assets less current liabilities* | | 91,283 | 67,819 |
| | ***Total net assets*** | | 91,283 | **67,819** |
| | **The funds of the charity:** | | | |
| 15 | Restricted income funds | | 56,254 | 36,140 |
| | Unrestricted funds | | | |
| 14 | General fund | | 16,098 | 13,679 |
| 14 | Designated funds | | 18,932 | 18,000 |
| | *Total unrestricted funds* | | 35,029 | 31,679 |
| | ***Total charity funds*** | | **91,283** | **67,819** |

Approved by the Trustees on 16 July 2026 and signed on their behalf by:

Christina Stokes 06 / 08 / 2026

Christina Stokes
BOPF Chair

Helena Milton-Thompson 03 / 08 / 2026

Helena Milton-Thompson
BOPF Treasurer



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**NOTES TO THE FINANCIAL STATEMENTS**
**YEAR ENDED 31 MARCH 2026**

## 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: deliver our projects, maintain our membership, carry out surveys, produce the BOPF Newsletters and e-Bulletins, for Open Forum meetings to further the purposes of the charity and their associated support costs.



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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 7.

**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.



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## 3. Income from donations

| Gifts and donations | 2026 | 2025 |
|---|---|---|
| Website donations | - | 25 |
| Open Forum donations | 203 | 172 |
| BOPF Music Club Donation | 633 | |
| Other Donations | | 90 |
| **Total Gifts & donations** | **836** | **287** |

## 4. Income from charitable activities: grants

| Grants | 2026 £ | 2025 £ |
|---|---|---|
| BCC Bristol Impact Fund 2 | 52,590 | 49,868 |
| BIF2 10% Uplift - Oct23-Sept25 | - | - |
| Feeding Bristol (BOPF Cookbook) | - | 2,000 |
| Quartet - BCC Cost of Living | - | 25,000 |
| Community Climate Action Plan | 1,000 | 6,750 |
| Awards for All - Death Cafes | - | 4,860 |
| UK Shared Prosperity Fund (UKSPF)<br>Learning and Co-design (Small Grants Fund) | - | 525 |
| UKSPF Reflective Practice (Small Grants Fund) | - | 525 |
| Winter Household Support Fund 2024 - Grant 2<br>Award Feeding Bristol (BOPF Cookbook reprint) | - | 990 |
| BCC Bristol Community Festival event, 270325 | - | 500 |
| Com. Climate & Nature Action Network | 2,000 | - |
| Household Support Fund 2025<br>Food film 2025, Maggs Smart Media | 12,251 | - |
| BWV&BOPF over55s Health Project | 2,520 | - |
| Nature Together | 50,000 | - |
| Housing Resident & Comm Panel | 450 | - |
| Equity Hub Community Access Partnership | 1,500 | - |
| My Music, Memories and Me (Beacon Event) | 550 | - |
| **Total** | **122,311** | **91,018** |

## 5. Income from charitable activities: trading income

| Income from other trading activities | 2026 | 2025 |
|---|---|---|
| Newsletter adverts | - | 600 |
| BOPF Consultancy | 1,975 | 1370 |
| **Total** | **1,975** | **1,970** |

## 6. Investment income

Investment income of £275 is interest received from the Triodos deposit account.



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## 7. Analysis on expenditure on charitable activities 1 April 2025 - 31 March 2026

| | Total 2025 -26 | Total 2024 -25 |
|---|---|---|
| **Direct costs** | | |
| Salaries, NI & pension | 59,640 | **56,912** |
| Freelance fees | 3,300 | **570** |
| Staff expenses | 399 | **366** |
| Newsletter | 2,666 | **4,366** |
| e-bulletin | 32 | - |
| Venue hire | 1,482 | **892** |
| Event/Project costs | 612 | **1,886** |
| User transport | 160 | - |
| Meeting costs (Zoom) | 312 | - |
| Volunteer vouchers | 45 | - |
| Communications costs | 331 | **990** |
| Trustee representation | 21 | - |
| **Total direct costs** | **68,998** | **65,983** |
| **Support costs** | | |
| Salaries | 19,841 | **18,971** |
| Other staff costs (CPD, DBS, training, recruitment) | 385 | **403** |
| **Governance** | - | |
| Independent Examination | 180 | 180 |
| Info Commissioners Office (ICO) | 47 | 47 |
| Trustee DBS | 123 | **-** |
| Trustee expenses | 73 | 152 |
| Trustee training | - | 55 |
| Trustee meetings (venue hire) | (27) | 113 |
| Service thank yous | 15 | 26 |
| Membership (Voscur, NPC) | - | 78 |
| **Office** | - | - |
| Office move to Create | 395 | - |
| Insurance | 426 | **541** |
| Rent | 5,038 | **4,492** |
| Telephone | 149 | **557** |
| Bank charges | 73 | **71** |
| Printing | 118 | **-** |
| Postage | 5 | **2** |
| Stationary | 32 | **116** |
| IT | 6,063 | **989** |
| Depreciation | - | **959** |
| **Total support costs** | **32,934** | **27,753** |
| **Total charitable activity costs** | **101,932** | **93,736** |



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

| | Total funds 2025-26 | Total funds 2024-25 |
|---|---|---|
| Salaries | 78,372 | 72,954 |
| Social Security costs | - | 1,302 |
| NEST Pension contributions | 1,108 | 1,627 |
| **Total staff costs** | **79,480** | **75,883** |

No employees had employee benefits in excess of £60,000 (2025 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.

Three Trustees received £94 for travel expenses for the furtherance of the CIO's charitable objects during the year (2024-25 £152 to two trustees).

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 (2025 3). This equates to an average of 2.5 full-time member of staff (2025 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 £119,311 (2023-24 £49,868)

## 11. Tangible fixed assets

| | IT equipment | Total |
|---|---|---|
| **Cost:** | **£** | **£** |
| As at 1 April 2025 | 2,875 | 2,875 |
| Additions | - | **-** |
| Disposals | - | **-** |
| As at 31 March 2026 | 2,875 | 2,875 |
| **Depreciation** | | |
| As at 1 April 2025 | 2,875 | 2,875 |
| Charge for the year | - | **-** |
| Eliminated on disposals | - | **-** |
| As at 31 March 2026 | 2,875 | 2,875 |
| **Net book value as at 31 March 2026** | - | **-** |
| Net book value as at 31 March 2025 | - | **-** |



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## 12. Debtors

| | 2026 | 2025 |
|---|---|---|
| Sundry debtors | - | - |
| **Total** | **-** | **-** |

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

| | 2026 | 2025 |
|---|---|---|
| Trade creditors | 2,577 | - |
| Accruals | 180 | 180 |
| **Total** | **2,757** | **180** |

## 14. Analysis of movements in unrestricted funds

| | Balance 1 Apr 2025 | Incoming resources | Resources expended | Funds at 31 Mar 2026 |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| General fund | 13,679 | 2,536 | 117 | 16,098 |
| Designated funds | | | | |
| BWV&BOPF over55s Health Project | - | 2,520 | 1,743 | 777 |
| My Music, Memories and Me (Beacon) | - | 550 | 395 | 155 |
| Contingency fund | 18,000 | - | - | **18,000** |
| **Total designated funds** | 18,000 | 3,070 | 2,138 | **18,932** |
| **Total** | 31,679 | 5,606 | 2,255 | **35,029** |

**Previous year comparison: movements in unrestricted funds 2024-25**

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

**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.



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## 15. Analysis of movements in restricted funds 2025-26

| | Balance 1 Apr 2025 | Incoming resources | Resources expended | Funds at 31 Mar 2026 |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| BCC Bristol Impact Fund 2 | 1,968 | 52,590 | 51,659 | 2,898 |
| BIF2 10% Uplift - Oct23-Sept25 | 9,974 | - | 5,015 | 4,959 |
| BIF2 Steering Group - Nov23-Oct24 | 306 | - | 306 | - |
| Quartet - BCC Cost of Living Yr2 | 18,064 | - | 18,064 | - |
| Community Climate Action Plan | 2,035 | 1,000 | 2,815 | 220 |
| Com. Climate & Nature Action Network | - | 2,000 | 1,072 | 928 |
| Awards for All - Death Cafes | 3,600 | - | 3,600 | - |
| Nature Together | - | 50,000 | 9,163 | 40,837 |
| Housing Resident & Comm Panel | - | 450 | 130 | 320 |
| Equity Hub Comm Access Partnership | - | 1,500 | - | 1,500 |
| BCC Bristol Community Festival Event 27 march 2025 | 193 | - | 193 | - |
| Food film 2025, Maggs Smart Media (Household Support Fund) | - | 12,251 | 7,660 | 4,591 |
| **Total** | **36,140** | **119,791** | **99,677** | **56,254** |



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**Previous year comparison: movements in restricted funds 2024-25**

| | Balance 1 Apr 2024 | Incoming resources | Resources expended | 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 - Cookbook reprint | - | 990 | 990 | - |
| BCC Bristol Community Festival 270325 | - | 500 | 307 | 193 |
| Fixed asset reserve | 959 | - | 959 | - |
| **Total** | **37,204** | **89,018** | **90,082** | **36,140** |

## 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**

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



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meaningful to grantees.

**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.

**BWV & BOPF over55s Health Project**

Bristol Older People's Forum (BOPF) are working with Bristol Women's Voice (BWV) on an over 55's women's health project.

**Community Climate Action Plan**

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

**Community Climate & Nature Action Network**

To test and scale up the successful Community Climate Action model, moving from the urban area of Bristol out to the diverse West of England (WoE), testing the model's future replicability across the rest of the UK.

**Awards for All - Death Cafes**

The delivery of 6 Death Cafes.

**Nature Together**

This project will fund 3 communities to work with the council and other partners to overcome barriers and develop new processes to bring nature into our city. We have employed 2 additional staff to deliver this project.

**Housing Resident & Community Panel**

To have regular representation on the Resident and Community Panel to hold Bristol City Council accountable for the performance of its landlord services, service improvement, and compliance with both the Regulator of Social Housing Consumer Standards and the Building Safety Act 2022.

**Equity Hub Community Asset Management Fund**

This project is in partnership with WECIL LTD [The Lead Partner], Bristol Disability Equality Forum, Bristol Somali Resource Centre, Bristol Women's Voice, Centre for Deaf and Hard of Hearing, Refugee Women of Bristol and Bristol Older People's Forum.

The attendance and facilitation of partnership meetings.

**BCC Bristol Community Festival, 27 March 2025**

The event was a special edition of the Open Forums that Bristol Older People's Forum members attend. This extra funding gave us the opportunity to run an Open Forum focused on member experience and best practice. Members were 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.

**My Music, Memories and Me!** - P**artnership with Bristol Beacon**

We have partnered with the Bristol Beacon to continue running our Music Club to deliver an innovative and creative new service to improve well-being and address social-isolation.



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