CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the Period

From: 1 May 2025 to 30th April 2026

Charity Name: Research and Development Forum

Charity Registration Number: 1189876

Objectives and Activities:

	SORP reference	
Summary of the purposes of the charity as set out in its governing document.	Para 1.17	The advancement of education and learning in research and development for the health and social care community in England, Scotland, Wales, and Northern Ireland. This will have public benefit in improving the quality and effectiveness of health and social care research.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	The main activity carried out by the CIO is to provide financial support for members of the community to engage in education and learning, which is of benefit to UK health and social care research. Examples of financial support include: contributions to cover costs for community members to attend conferences; contributions to costs for trustees, working group chairs and/or co-chairs to represent the community on national working groups that influence policy with bodies including the Department of Health and Social Care (DHSC), the Health Research Authority (HRA), NHS England (NHSE) and the National Institute for Health and Care Research (NIHR); contributions to costs to facilitate partnering with other organisations and groups across the UK who support health and social care research; and providing funding to cover the essential infrastructure needed to facilitate these interactions. The trustees continue to remain cautious in its approach to allocating and awarding funding. This is due to the ongoing instability in the UK health and social care research system, impacted by changes in national policy, priorities, systems and structures. The trustees are always mindful of the inherent risks due to such instability, and this cautious approach is one way of

		mitigating our risk.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit.	Para 1.18	The trustees have regard to the guidance issued by the Charity Commission on public benefit. The CIO funded activities, governance and oversight support a UK-wide community that works together to improve the quality and effectiveness of UK health and social care research which has impact on people's lives. Equity, diversity, inclusion and belonging continues to be at the forefront of all decision-making for the CIO, as involvement and engagement in UK health and social care research must not and cannot be exclusive.

Additional information (Optional):

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making.	Para 1.38	N/A
Policy on social investment including programme related investment.	Para 1.38	N/A
Contribution made by volunteers.	Para 1.38	Through the CIO, we have a number of peer-led working groups that provide specialist input on topics such as research finance, contracting, data and AI and research settings. These working groups operate organically – being formed by the community, for the community to address unmet need around specific topics. Members of the working groups are recognised across the UK health and social care research system as experts in their field, often invited to be part of national consultations and projects. Working groups are chaired and co-chaired by volunteers from the R&D community. To recognise their generosity in giving up their time, sharing their expertise, promoting the work of the CIO and leading by example, they are offered either a funded place at the annual conference or a place on one of our training programmes. The volunteers add value and are highly valued by the CIO, as without their support, the CIO would not be where it is today.
Other.		N/A

Achievements and Performance:

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	Through the activities of RDF Professional Development Limited, the CIO's trading arm, we delivered, once again, the largest ever in-person conference to date as well as training opportunities across the UK health and social care research community. The annual conference held in Manchester in May 2025 built on the success of the 2024 conference with over 950 delegates from across the UK health and social care research system. It also received record levels of oral and poster abstracts from across the UK health and social care research community, with colleagues keen to share their work. Following the appointment of 4 additional trustees in June 2024, the CIO now has 10 trustees who have the collective skills, experience and knowledge that covers the breadth and depth of health and social care research across the UK and is representative of the community it serves. The skills audit that we have adopted as a Board of Trustees is regularly reviewed to ensure we are representative, and if not, agree the action we need to take to remedy this, In line with our approach to the May 2024 conference, we offered funding to cover costs of attendance for those in volunteer roles, as well as a paid place for a new entrant to UK research and development to encourage attendance from under-represented groups. We also introduced a 50% discount to those who deliver training for the trading subsidiary in recognition of their ongoing support of the CIO. In the year, we offered 5 different training courses, covering 5 topic areas, delivered either in person or online. These courses attracted 87 registrations, and the feedback was very positive. As part of our commitment continuous improvement, the feedback is acted upon to ensure we are meeting the needs, through our training offer, of the community the CIO is there to support. The number of training courses and topic areas is lower than the previous year. This is due to the commencement of a critical

		review of our training offer which includes course content, structure, methods of delivery and cost. This work will be complete in the next reporting period. We continue to buy in specialist administrative and co-ordination support for the CIO from the UK health and social care research system. This investment continues to be instrumental in developing our social media presence and building our HIVE Mind – a peer-led and supported network from across the UK now with over 500 members which shares best practice, peer support and information in a supportive way. This is a 67% increase from the previous year. The HIVE Mind monthly online session regularly has over 70 attendees – a 40% increase from the previous year. In response to community demand, we have stepped up dedicated information sharing sessions for research study set-ups. These sessions attract over 100 attendees and are well received. The specialist support role has also been working closely with the Chair in testing out new platforms that will better support the community. Microsoft Teams will be introduced in the next reporting period to support the activities of the trustees, working groups, HIVE Mind, training, conference, symposia and any other activities which require a software solution which makes it as easy as possible to engage and connect. Our working groups are regularly invited to be part of national policy reviews and updates, ensuring the voice of the community is at the table, has influence, and is being heard. For example, the Research Finance Working Group was involved in the updated NHS England Research Finance Guidance that will be published later this year, the Research Management Working Group fed into the NHS England Leadership and Management Framework that will also be published later this year and the members from across the Working Groups have been informing the policy, funding and operational discussions in relation to streamlining study set-up. In year, the trustees took the decision to focus social media activity away from X and towards BlueSky and LinkedIn. This is

		in line with stakeholder behaviour, with LinkedIn now becoming the ‘platform of choice’. As at the end of the reporting period, the number of LinkedIn followers had increased to 5,180, and in April 2026, our posts made 54,840 impressions.

Additional Information (Optional):

You may choose to include further statements where relevant about:

Achievements against objectives set.	Para 1.41	N/A
Performance of fundraising activities against objectives set.	Para 1.41	N/A
Investment performance against objectives.	Para 1.41	N/A
Other.		N/A

Financial Review:

Review of the charity's financial position at the end of the period.	Para 1.21	As we continue to invest in the business, profile raising and engagement of the CIO volunteers to create the firm foundation to build on, the movement in reserves was planned. However, such movement will not be recurrent. Financial sustainability continues to be a priority for the trustees, and there is greater scrutiny of the direct and overhead costs of our trading activities. This has been supported by the appointment of new directors to the subsidiary company in year who will work hard to ensure we maximise surpluses from activities so the CIO can achieve its objectives.
Statement explaining the policy for holding reserves stating why they are held.	Para 1.22	Sustainability of the CIO and meeting the needs of the community is a high priority for the trustees. The UK health and social care research system is in a state of flux, and financial pressures in the system can impact on their ability to investment in its workforce through education and learning – our main source of income. To ensure the CIO is able to operate in the event of a material reduction in our income, which could result from funding challenges in and across the UK health and social care research system, reserves to cover 12 months operating costs will be held as a mitigation. We will be introducing an investment strategy and financial reserves policy in 2026/27 to formalise this approach.
Amount of reserves held.	Para 1.22	£322,728
Reasons for holding zero reserves.	Para 1.22	N/A
Details of fund materially in deficit.	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern.	Para 1.23	Longevity for the CIO is a high priority, and part of planning for this is a prudent approach to financial management and maintaining a level of reserves that would allow the CIO to function without any new income for a period of 12 months. Training and conferences continue to be well attended, and through active monitoring and feedback loops, we respond

		to the needs of our community. We are also actively involved in national discussions with funders and policy makers to ensure we respond to the needs of the wider UK health and social care research system, highlighting the CIO is self-sustaining and, that in the current environment, this is a risk. Having such honest and transparent discussions is essential to our continuity and longevity.

Additional Information (Optional):

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising).	Para 1.47	Surplus from the annual conference and training activity**.**
Investment policy and objectives including any social investment policy adopted.	Para 1.46	N/A
A description of the principal risks facing the charity.	Para 1.46	The annual conference in May 2026 not generating forecast surplus and the new training offer planned in late 2026 and into 2027 may not realise funds anticipated.
Other.		N/A

Structure, Governance and Management:

Description of charity's trusts:		
Type of governing document.	Para 1.25	Research and Development Forum Constitution.
How is the charity constituted?	Para 1.25	Charitable Incorporated Organisation.
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees.	Para 1.25	Any vacancies on the Board of Trustees are openly advertised through the working groups and our monthly newsletter which has 2,870 subscribers. Where necessary, we reference any specific skills, knowledge or experience that we feel is required. This is informed through the annual review of the Trustees skills matrix and terms of office. The Constitution allows up to 12 trustees, and at the end of this reporting period, we have 10 in post. We will be ensuring, as is good practice, to have a staggered approach to replacement, thus ensuring continuity on the Board. As we become more mature, more representative of the community we serve and more future-focussed, we will, through the review of the skills audit, continue to be more targeted in our recruitment of trustees. All trustees are, and always will be, engaged in the recruitment and selection process for any additional or replacement trustees.

Additional Information (Optional):

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees.	Para 1.51	New trustees will be directed to the: • Charity Commission's 'Roles and Responsibilities of trustees' guidance • Constitution. • Trustees annual report and financial statements • Previous minutes of the trustee meetings New trustees will be given: • Full access to dedicated shared platform for CIO business (Future NHS) • Ongoing peer support from current trustees
The charity's organisational structure and any wider network with which the	Para 1.51	The CIO has a Board of 10 trustees from across the UK, with 1 of the trustees acting as Chair. The Board is supported by a part-

charity works.		time co-ordinator. The Board meets monthly, online, and has a clear agenda, from which minutes and actions are taken and progressed. The Board operates under a Compact, informed by the Nolan Principles, setting the expected behaviours of how the trustees and co-ordinator will work together, as well as with key stakeholders. Every quarter, the Board meets online with the Chairs and Co-Chairs of the working groups to ensure there is good communication flows between and across them all groups. The culture is one where every voice matters, and these voices inform decisions made. The CIO does not directly employ any staff - it buys in services needed to allow it to run, both at an operational and strategic level.
Relationship with any related parties.	Para 1.51	The CIO has a trading subsidiary – RDF Professional Development Limited, through which it offers conferences, symposia, and training and development opportunities to the UK health and social care research community. An annual charitable donation is made from the trading subsidiary to the CIO to enable it to achieve its charitable objects. The trading subsidiary is supported via a virtual office for its activities and the relationship and has its own, separate, Board of Directors.
Other.		N/A

Reference and Administrative Details:

Charity name:	Research and Development Forum
Other name the charity uses:	N/A
Registered charity number:	1189876
Charity's principal address:	39 Mill Crescent Hebburn Tyne and Wear NE31 1UG

Names of the Charity Trustees Who Manage the Charity:

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
Angela Topping	Chair		
Carolyn Maloney			
Dipak Patel	Treasurer		
Margaret Cooper			
Mark Brandon-Grove			
Philippa Brice			
Rachel Gemine			
Sean Scott			
Shahista Hussain			
Shona Haining			

Corporate Trustees – Names of the Directors at the Date the Report Was Approved:

Director name	Dates acted if not for whole year
N/A	

Name of Trustees Holding Title to Property Belonging to The Charity:

Trustee name	Dates acted if not for whole year
N/A	

Funds Held as Custodian Trustees on Behalf of Others:

Description of the assets held in this capacity.	N/A
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects.	N/A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets.	N/A

Additional Information (optional):

Names and addresses of advisers (optional information):

Type of adviser	Name	Address
N/A		

Name of chief executive or names of senior staff members (optional information):

N/A

Exemptions From Disclosure:

Reason for non-disclosure of key personnel details:

N/A

Other Optional Information:

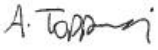
N/A

Declarations:

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

Signed on behalf of the charity trustees:

Signature(s):

Full name(s):

Angela Topping	

Position:

Chair	

Date:

10.11.2026	

CHARITY COMMISSION FOR ENGLAND AND WALES

Charity Name	No (if any)
Research and Development Forum	

Receipts and payments accounts

CC16a

For the period from	Period start date	To	Period end date
	1-May-25		30-Apr-26

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Transfer of funds trom trading activities	21,224	-	-	21,224	50,000
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total *(Gross income for AR)*	21,224	-	-	21,224	50,000
A2 Asset and investment sales, (see table).					
	-	-	-	-	
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	21,224	-	-	21,224	50,000
A3 Payments					
Expenses	3,912	-	-	3,912	3,701
External Services - Co-ordination	21,960	-	-	21,960	41,965
External Services - Oversight	33,583	-	-	33,583	13,000
Grant Funding - RDF26 Contribution	20,418	-	-	20,418	-
External Services - Retender	197	-	-	197	-
Grant Funding - RDF25 Contribution	-	-	-	-	29,154
Grant Funding - RDF24 Contribution	-	-	-	-	14,454
Postage	-	-	-	-	4
	-	-	-	-	-
Sub total	80,070	-	-	80,070	102,278
A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	
Sub total	-	-	-	-	-
Total payments	80,070	-	-	80,070	102,278
Net of receipts/(payments)	- 58,846	-	-	- 58,846	- 52,278
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	381,574	-	-	381,574	433,852
Cash funds this year end	322,728	-	-	322,728	381,574

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds		322,728	-	-
		-	-	-
		-	-	-
	Total cash funds	322,728	-	-

(agree balances with receipts and payments account(s))

	OK	OK	OK
	Unrestricted funds	**Restricted funds**	**Endowment funds**

B2 Other monetary assets

Details	to nearest £	to nearest £	to nearest £
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
A. Topping	Angela Topping	10/26/2026