

# Annual Return 2009 (Online)



## THE BATH GENERAL PRACTICE EDUCATION AND RESEARCH TRUST

**Charity Number: 1005171**

**Submitted on 07 June 2010**

Some of the information you give in this form will become publicly available on the Register of Charities in accordance with the Charities Act 1993, as amended by the Charities Act 2006. These fields are marked - **P**

This form shows the information you have entered through the Annual Return 2009 Online.

**The Annual Return was submitted online by MRS ALISON BETH TAYLOR on 07 June 2010. You do not need to send us a signed copy once the document has been submitted.**

## PART A - Charity Information

### A1 - FINANCIAL YEAR

This Annual Return should be completed for financial years ending on or after 1<sup>st</sup> January 2009.

Financial year start - <b>P</b> :	01 April 2008
Financial year end - <b>P</b> :	31 March 2009
Next financial year end:	31 March 2010

### A2 - INCOME AND EXPENDITURE

This shows your charity's income and expenditure for the financial year shown at A1. PLEASE NOTE THESE FIGURES ARE ROUNDED TO THE NEAREST POUND.

Income - <b>P</b> :	£89,914
Expenditure - <b>P</b> :	£121,396

## A3 - CHARITY CONTACT

The contact details for your charity are printed below.

Your current contact is an: Individual

Title:	MRS
Personal Names:	ALISON BETH
Family Name:	TAYLOR
Suffix:	BA HONS, PG DIP LIB
Preferred Name - <b>P</b> :	ALI TAYLOR
Date of Birth:	17 December 1956
Telephone - <b>P</b> :	01225 448 444
Mobile:	
Your contact details as shown on the Register of Charities are - <b>P</b> :	ALI TAYLOR BATH INSTITUTE FOR RHEUMATIC DISEASES TRIM BRIDGE BATH BA1 1HD

## A4 - EMAIL FOR CHARITY COMMISSION USE

This is an address that will only be used by the Commission for contacting the charity, for example when issuing a password for our online services or for mailing reminders.

Your current private email address: [bgpert@birdbath.org.uk](mailto:bgpert@birdbath.org.uk)

## A5 - EMAIL FOR PUBLIC DISPLAY

This is a public address that will be displayed on the Register of Charities.

Your current public email address - **P**: [bgpert@birdbath.org.uk](mailto:bgpert@birdbath.org.uk)

## A6 - CHARITY WEBSITE

If the charity has its own website and we hold the address, a hyperlink will be available for the public to access the site from the charity's entry on the Register of Charities.

Your current charity website - **P**: [www.bathgped.co.uk](http://www.bathgped.co.uk)

## A7 - CORPORATE TRUSTEE

Your charity has no corporate trustees.

## A8/A9 - CURRENT AND NEW INDIVIDUAL TRUSTEES

Printed below is the list of current trustees who are individuals that we hold for your charity.

Please note, the addresses given should be the trustees' home address rather than a work or the charity address. Please ensure that we have a complete set of details for each trustee. Trustees without a complete set of details may not be recorded on our Register of Charities.

We only publish trustee names on the Register. Other personal details are not made publicly available.

The Commission may email trustees who have given us a personal email address with important updates about trusteeship from time to time. Your charity has told us that their trustees **wish to receive these updates**.

**Trustee 1**

Title:	DR
Personal Names:	GUY MARK
Family Name:	WORSDALL
Suffix:	
Preferred Name - <b>P</b> :	DR GUY WORSDALL
Date of Birth:	27 November 1958
Address:	REDFIELD FARM STEAM MILLS MIDSOMER NORTON RADSTOCK
Post Code:	BA3 2JY
Telephone:	01761 415260
Email:	
Chair of the Charity - <b>P</b> :	YES

**Trustee 2**

Title:	DR
Personal Names:	RICHARD LLOYD
Family Name:	WHARTON
Suffix:	
Preferred Name - <b>P</b> :	DR RICHARD WHARTON
Date of Birth:	17 June 1953
Address:	HAMSWELL FARM HAMSWELL BATH
Post Code:	BA1 9DG
Telephone:	01225-891234
Email:	hamswell@gmail.com
Chair of the Charity - <b>P</b> :	NO

**Trustee 3**

Title: DR  
Personal Names: HELEN  
Family Name: PAULI  
Suffix:  
Preferred Name - **P**: DR HELEN PAULI  
Date of Birth: 03 February 1963  
Address: TRIANGLE COTTAGE  
ENGLISHCOMBE  
BATH  
Post Code: BA2 9DU  
Telephone: 07967 834416  
Email:  
Chair of the Charity - **P**: NO

**Trustee 4**

Title: DR  
Personal Names: COLEEN  
Family Name: CAMPBELL  
Suffix:  
Preferred Name - **P**: DR COLEEN CAMPBELL  
Date of Birth: 07 July 1966  
Address: 6 VICTORIA PLACE  
LARKHALL  
BATH  
Post Code: BA1 6RW  
Telephone: 01225-313418  
Email: coleencampbell@doctors.org.uk  
Chair of the Charity - **P**: NO

**Trustee 5**

Title: DR  
Personal Names: STEPHEN  
Family Name: ROWLANDS  
Suffix:  
Preferred Name - **P**: DR STEVE ROWLANDS  
Date of Birth: 16 July 1953  
Address: 3 STILLMAN CLOSE  
HOLT  
TROWBRIDGE  
Post Code: BA14 6QS  
Telephone: 01225-782265  
Email: steve-chris.rowlands@tiscali.co.uk  
Chair of the Charity - **P**: NO

**Trustee 6**

Title: DR  
 Personal Names: LOUISE  
 Family Name: WILLCOCKS  
 Suffix:  
 Preferred Name - **P**: DR LOUISE WILLCOCKS  
 Date of Birth: 15 January 1976  
 Address: 8 HOMEFIELD  
 TIMSBURY  
 BATH  
 Post Code: BA2 0LU  
 Telephone: 01761471698  
 Email:  
 Chair of the Charity - **P**: NO

**A10 - LINKED CHARITIES**

We have no active linked (subsidiary or constituent) charities associated with this charity. If this is incorrect please call our contact centre on 0845 3000 197.

**A11 - AREA OF OPERATION IN ENGLAND AND WALES**

Shown below are the areas in England and Wales that we currently hold for your charity - **P**.

- |   |                     |   |          |
|---|---------------------|---|----------|
| 1 | BATH AND NORTH EAST | 2 | SOMERSET |
|   | SOMERSET            |   |          |
| 3 | WILTSHIRE           |   |          |

**A12 - AREA OF OPERATION OUTSIDE ENGLAND AND WALES**

Your charity has not specified any countries of operation outside England and Wales.

**A13 - CHARITY CLASSIFICATION**

Printed below are the details we currently hold for your charity.

**WHAT** your charity sets out to do - **P**:

	101 General Charitable Purposes
✓	102 Education/Training
✓	103 Medical/Health/Sickness
	104 Disability
	105 Relief of Poverty
	106 Overseas aid/Famine relief
	107 Accommodation/Housing

	108 Religious activities
	109 Arts/culture
	110 Sport/recreation
	111 Animals
	112 Environment/Conservation/Heritage
	113 Economic/Community development/Employment
	114 Other charitable purposes

**WHO** your charity helps - **P**:

	201 Children/Young people
	202 Elderly/Old People
	203 People with disabilities
	204 People of a particular ethnic or racial origin
	205 Other charities/Voluntary bodies
✓	206 Other defined groups
	207 General public/Mankind

**HOW** your charity operates - **P**:

	301 Makes grants to individuals
	302 Makes grants to organisations
	303 Provides other finance
	304 Provides human resources
	305 Provides buildings/facilities/open space
	306 Provides services
✓	307 Provides advocacy/advice/information
✓	308 Sponsors or undertakes research
	309 Acts as umbrella or resource body
	310 Other charitable activities

## A14 - CHARITY ACTIVITIES

Your charity has given us the following brief description of its current activities - **P**.

UNDERTAKE RESEARCH AND EDUCATION RELEVANT TO PRIMARY CARE AND GENERAL PRACTICE

## A15 - UK VOLUNTEERS

Your charity has told us that it had 0 UK volunteers during the financial year.

## A16 - CHARITY'S MAIN BANK/BUILDING SOCIETY ACCOUNT

Below are the current details we hold about your main bank or building society account. Account details are not available to the public. For security purposes we have not printed the full account number.

Bank name:	BARCLAYS BANK PLC BATH MILSOM STREET
Sort code:	20-05-06
Account number:	****1901
Account name:	BATH G.P EDUCATION FUND

## REPORTING SERIOUS INCIDENTS

As soon as possible, you should report to the Commission and incidents that cause a significant loss of funds or pose serious risks to a charity's beneficiaries, resources or reputation.

If any of the serious incidents listed below have occurred since your last return, you should notify the Commission immediately if you have not already done so.

### SERIOUS INCIDENTS

- Fraud, theft or significant loss of funds or other property.
- Significant sums of money or other property donated to the charity from an unknown or unverified source.
- The charity (including any individual staff, trustees or volunteers) has any known or alleged link to a proscribed(banned) organisation or to terrorist or other unlawful activities.
- A person disqualified from acting as a trustee has been or is currently acting as a trustee of the charity.
- The charity does not have a policy for safeguarding its vulnerable beneficiaries (e.g. children and young people, people with disabilities and the elderly/old people).
- The charity has no vetting procedure to ensure that a trustee or member of staff is eligible to act in the position he or she is being appointed to.
- Suspicions, allegations or incidents of abuse or mistreatment of beneficiaries.
- The charity has been subject to a criminal investigation, or an investigation by another regulator or agency; or sanctions have been imposed or concerns raised by another regulator or agency (e.g. the Health and Safety Executive, Ofsted).

When you report a serious incident we will generally ask you for further details. You may not have all of these but please be prepared to provide as much relevant information as possible about the incident. We are mainly concerned about criminal or unlawful activity, or very serious incidents about a charity that may affect its funds, property, beneficiaries or reputation. Some of the incidents listed may not actually be criminal, but do suggest risks of potential criminal activity or other risks which, if they became reality, would cause serious harm to the charity.

### LEGAL OBLIGATION

As part of the charity's Annual Return, trustees must confirm that there are no serious incidents or other matters which they should have brought to the attention of the Commission and have not done so already. Failure to do so will be regarded as a breach of legal requirements.

### DATA PROTECTION

Any information you provide to us will be held securely and in accordance with the rules on data protection. Your personal details will be treated as private and confidential and safeguarded and not disclosed to anyone unconnected with the Charity Commission unless you have consented to its release, or in certain circumstances where:

- we are **legally** obliged to do so; or
- disclosure is deemed by the Commission to be **necessary** for the proper discharge of our statutory functions; or
- disclosure is deemed by the Commission to be **necessary** in compliance with our function as regulator of charities; or
- disclosure to a relevant public authority is deemed by the Commission to be both a **necessary** disclosure and subject to an **overriding public interest**.

We will ensure that any disclosure made for this purpose is proportionate, considers your right to privacy and is dealt with fairly and lawfully in accordance with the Data Protection Principles of the Data Protection Act.

The Data Protection Act 1998 regulates the use of 'personal data', which is essentially any Information however stored, about identifiable living individuals. As a 'data controller' under the Act, the Charity Commission must comply with its requirements.

## ADVICE FOR THE TRUSTEES AND MANAGERS OF THE BATH GENERAL PRACTICE EDUCATION AND RESEARCH TRUST

The following Guidance may be useful for your trustees. To view these publications, please visit our website at [www.charitycommission.gov.uk/publications](http://www.charitycommission.gov.uk/publications). If, after reading the guidance you require assistance or feel there is a matter on which you would benefit from advice, please call Charity Commission Direct on 0845 3000 218.

### Trusteeship

#### [CC30 Finding New Trustees](#)

A 'start to finish' guide to help charities to recruit new trustees effectively and increase the range of skills and experience on their board. **Also includes useful information on vetting trustees and the Criminal Records Bureau which may be useful to existing trustees.**

#### [CC3 The Essential Trustee](#)

This publication replaces the previous CC3, Responsibilities of Trustees, provides guidance to all trustees, and those who are about to become trustees, on what is involved in being a charity trustee.

### Accountancy

#### [CC15 Charity Reporting and Accounting](#)

This guidance should only be used by charities preparing accounts under SORP 2005 and the 2000 Regulations – charities preparing accounts for accounting periods beginning on or after 1 April 2006.

#### [CC16 Receipts & Payments Accounts Pack](#)

This pack is intended for non-company charities with a gross annual income under £100,000, and who choose to prepare their accounts on the simpler receipts and payments basis.

### Reserves

#### [RS13 Tell It Like It Is](#)

Charities are urged to remove the mystique surrounding their reserves.

### Fundraising

#### [CC20 Fundraising](#)

This booklet explains charity fund-raising law and gives general advice.

## Sound Governance

### [CC10 Hallmarks of an Effective Charity](#)

This guidance focuses on the achievements, performance and impact of an effective charity as well as the principles which the Commission expects charities and charity trustees to adhere to.

### [CC48 Meetings](#)

This publication gives guidance on the law and good practice of charity meetings.

## DECLARATION

Your Annual Return was submitted online by MRS ALISON BETH TAYLOR on 07 June 2010, telephone number 01225 448 444.

MRS ALISON BETH TAYLOR certified online that:

- the information provided was correct
- it had been or would be brought to the attention of all the trustees
- that the trustees were satisfied that there are no serious incidents or other matters which they should have brought to the attention of the Commission and had not done so already.

Those who give answers that they know are untrue or misleading may be committing an offence.

## CONTACT DETAILS

### **Address**

The Charity Commission  
PO Box 1329  
Liverpool  
L69 3DY

### **Telephone**

0845 3000 218

### **Textphone**

0845 3000 219

### **Email**

[enquiries@charitycommission.gsi.gov.uk](mailto:enquiries@charitycommission.gsi.gov.uk)

### **Web**

[www.charitycommission.gov.uk](http://www.charitycommission.gov.uk)