

CARLISLE DIOCESE MOTHERS UNION

England & Wales · Charity number 1078251

Details

Status Registered

Legal form Other

Registered 1999-11-17

Register [View on the Charity Commission register](#)

Contact

Address 29 Meadow Close
Lazonby
Penrith
CA10 1BF

Phone 07803244695

Activities

Objects: 1. TO UPHOLD CHRIST'S TEACHING ON THE NATURE OF MARRIAGE AND TO PROMOTE ITS WIDER UNDERSTANDING.2. TO ENCOURAGE PARENTS TO BRING UP THEIR CHILDREN IN THE FAITH AND LIFE OF THE CHURCH.3. TO MAINTAIN A WORLD-WIDE FELLOWSHIP OF CHRISTIANS UNITED IN PRAYER, WORSHIP AND SERVICE4. TO PROMOTE CONDITIONS IN SOCIETY FAVOURABLE TO STABLE FAMILY LIFE AND THE PROTECTION OF CHILDREN.5. TO HELP THOSE WHOSE FAMILY HAS MET WITH ADVERSITY

Activities: PROMOTING MARRIAGE AND FAMILY LIFE, ENCOURAGING PARENTS TO BRING THEIR CHILDREN UP IN THE CHRISTIAN FAITH AND FOR THE PROTECTION OF CHILDREN

Classification

- **How:** Acts As An Umbrella Or Resource Body
- **What:** Education/training, The Prevention Or Relief Of Poverty, Overseas Aid/famine Relief, Religious Activities
- **Who:** Children/young People, The General Public/mankind

Geography

- **Area of benefit:** CARLSILE
- Cumbria

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£44,698	£45,181	-	-
2023-12-31	£33,781	£38,466	-	-
2022-12-31	£38,486	£39,115	-	-
2021-12-31	£31,568	£37,596	-	-
2020-12-31	£27,884	£36,440	-	-

Trustees

Name	Role	Appointed
Ann Wodeman		2019-01-01
Barbara Simpson		2013-12-16
Carole Gardner		2016-01-01
Gwen Birkett		2025-02-01
Helen Ann Belton		2023-02-08
Kay Shepherd		2022-02-26
Rev Angela Whittaker		2025-02-01
Stephanie Jane Conlan		2025-02-01

CARLISLE DIOCESE MOTHERS UNION

England & Wales - Charity number 1078251

Accounts

SIGNED
COPY

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CARLISLE DIOCESE MOTHERS' UNION
REPORT AND CONSOLIDATED ACCOUNTS
FOR THE YEAR ENDED
31ST DECEMBER 2024

Registered Charity No. 1078251

Contents:

Report of the Trustees

Report of Independent Examiner

Consolidated Statement of Financial Activities

Consolidated Balance Sheet

CARLISLE DIOCESE MOTHERS' UNION
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29 Meadow Close, Lazonby, Penrith. CA10 1BF.

The Board of Trustees who served during the year ended 31st December 2024 were :

Diocesan President.

Deb Lee

Vice Presidents.

Carole Gardner

Helen Belton.

Deanery/ Archdeaconry Leads.

Ann Wodeman

Barbara Simpson (co-opted)

Kay Shepherd

The Board was elected from 1st January 2022 for a 3 year term.

The Diocesan President , Vice Presidents and Deanery Leads are appointed by members of the Diocesan Council by simple majority.

Bankers.

Cumberland Building Society, Carlisle CA3 0JF

CARLISLE DIOCESE MOTHERS' UNION
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The aim of the Charity is the advancement of the Christian religion in the sphere of marriage and family life.

In order to carry out this aim the objects of the Mothers' Union are:

- To uphold Christ's teaching on the nature of marriage and to promote its wider understanding.
- To encourage parents to bring up their children in the faith and life of the Church.
- To maintain a world-wide fellowship of Christians united in prayer, worship and service.
- To promote conditions in society favourable to stable family life and the protection of children.
- To help those whose family life has met with adversity.

Membership is open to all who have been baptised in the name of the Holy Trinity and who declare their support for the aims and objects of the Mothers' Union.

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They shall debate, consider and determine all matters of policy and strategy to be effected on behalf of Carlisle Diocese Mothers' Union.

They shall manage and supervise the finances of the charity and and review & evaluate it's work.

They shall receive, consider and respond to all resolutions received from the Diocesan Council.

Procedures are in place for the regular training of Trustees to ensure good practice and awareness of their responsibilities. Training is also given to Deanery and Branch officers at regular intervals.

Reserves Policy

The Trustees have reviewed the Unrestricted Reserves of the charity. This review has considered the nature of the income and expenditure streams and the need to match variable income with fixed expenditure commitments. The review has concluded that to allow the charity to be managed efficiently reserves should be kept at a level which equates to approximately 12 months of charitable expenditure.

Organisation

Carlisle Diocese Mothers' Union is autonomous and is one of the federated Mothers' Union Charities in the British Isles. As such it operates in conjunction with the central charity of the Mothers' Union based at Mary Sumner House, 24 Tufton Street, London. SW1P 3RB.

Review of the Year.

In 2024 there were 39 branches and 776 members of the Carlisle Diocese Mothers' Union. Some members not belonging to a particular branch are Diocesan Members. The organisation, whether at Diocesan, Deanery or Branch level, aims to reach out to those in need of all ages. Communities of interest, together with Diocesan Services, all help to facilitate the work. In addition to assisting with major projects

organised by the Action and Outreach Team many branches have their own "mini projects". All the work is underpinned by prayer. Carlisle Diocese is linked with 3 dioceses overseas - Diocese of Zululand, Diocese of Stavanger and Diocese of Northern Argentina - as well as various Christian mission agencies. The Carlisle Diocese Mothers Union also has links with Boga in DR Congo, Tanga in Tanzania, Ogoni in Nigeria, Manicaland in Zimbabwe and Melbourne in Australia.

To enable all members to be informed, a newsletter is produced and distributed 3 times a year. During 2024 the Trustees met 4 times and the Council met twice - all meetings were face to face. There was also a face to face Sharing Day held in May 2024 .

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Away from it All (AFIA) : During 2024 CDMU continued its collaboration with Time to Change and hired a caravan at Seacote Holiday Park, St Bees. The caravan was offered to families & those needing a break who were unable to afford a holiday.

This venture has been well supported and the intention is to continue this in 2025.

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The Trustees have considered the requirements of the Charity Commission regarding public benefit and are satisfied that the activities of Carlisle Diocese Mothers' Union meet these requirements.

Independent examiner's report to the trustees of Carlisle Diocese Mothers' Union

I report to the trustees on my examination of the accounts of Carlisle Diocese Mothers' Union (the Charity) for the year ended 31 December 2024.

Responsibilities and basis of report

As the trustees of the Charity, 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 giving me cause to believe that in any material respect:

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or
2. the accounts do not accord with those records.

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Name: Mr William Douthwaite

Address: Tidal Views, Heversham. Milnthorpe. LA7 7EW

Date: 10/07/2025

Carlisle Diocesan Mothers' Union

Consolidated Statement of Financial Activities for the year to 31st December 2024

<u>INCOME</u>	2024		2023	
Voluntary Income.	£	£	£	£
Subscriptions and Levies	20,373		18,294	
Donations & Legacy	3,617		2,111	
Gift Aid recovered	4,933		-	
Christmas Appeal donations	1,039		-	
Special Events inc Summer of Hope	8,918		7,925	
Income from Meetings	<u>3,722</u>	42,602	<u>3,710</u>	32,040
Income from Trading Activities				
Turnover grant from MSH		778		742
Other Income				
Investment Income		1,318		999
TOTAL INCOME		<u>£44,698</u>		<u>£33,781</u>
<u>EXPENDITURE</u>				
Payments to Central Mothers' Union				
Membership Subscriptions	17,801		16,400	
Donations to Mary Sumner House	754		30	
Overseas Fund	869		1,590	
Christmas Appeal	3,500		-	
Summer of Hope/ Make a Mothers Day	<u>74</u>		<u>294</u>	
		22,998		18,314
Administration & Training				
Conference & Training Days	240		164	
Meeting Costs	2,720		2,493	
Insurance	450		450	
Office Holder Expenses	5,103		4,313	
Speakers Fees & Expenses	<u>1,519</u>	10,032	<u>1,285</u>	8,705
Other Expenses				
Communication & Printing	3,429		2,908	
Project Support	4,217		6,266	
DBS Membership & Checks	215		145	
Branch & Deanery Admin Exps	<u>4,290</u>	12,151	2,127	11,447
TOTAL EXPENDITURE		<u>£45,181</u>		<u>£38,466</u>
NET INCOME/ (EXPENDITURE)		-£483		-£4,685
General Funds B/fwd		£52,959		£57,644
General Funds C/fwd		£52,476		£52,959

Carlisle Diocesan Mothers' Union
Consolidated Balance Sheet as at 31st December 2024

	<u>2024</u>		<u>2023</u>	
General Fund	£	£	£	£
CBF Deposit Account		22,047		22,047
Cash at Bank - Diocesan Account	19,216		18,736	
Cash at Bank - Branches	10,781		11,147	
Cash at Bank - Deaneries	<u>432</u>	30,429	<u>1,029</u>	30,912
TOTAL FUNDS (as per I&E)		<u>£52,476</u>		<u>£52,959</u>
Restricted Fund (One to Five Activities)				
Opening Balance		15,764		15,180
Less: 1 to 5 Grants and Expenses		-1,770		-200
Add : Investment Income		631		369
Share valuation increase/ (decrease)		111		415
Closing Balance		<u>£14,736</u>		<u>£15,764</u>
Represented by:				
CBF Deposit Account		12,526		11,895
CBF Investment Fund		4,942		4,831
Diocesan Current Account		-2,732		-962
		<u>£14,736</u>		<u>£15,764</u>
AFIA (Away from it All) Fund				
Opening Balance Adjustment (Lloyds Bank)		5,412		3,699
Donations and Legacies (incl Caravan)		3,780		4,361
Caravan Expenditure		-2,414		-2,198
Holiday Grant		-40		-450
Closing Balance		<u>£6,738</u>		<u>£5,412</u>
Represented by:				
Lloyds Current a/c		6451.12		5,456
Diocesan Current Account		287		-44
		<u>£6,738</u>		<u>£5,412</u>

CARLISLE DIOCESE MOTHERS UNION

England & Wales - Charity number 1078251

Accounts

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Name: Mr William Douthwaite

Address: Tidal Views, Heversham. Milnthorpe. LA7 7EW

Date: 16th July 2024

Carlisle Diocesan Mothers' Union

Consolidated Statement of Financial Activities for the year to 31st December 2023

<u>INCOME</u>	2023		2022	
Voluntary Income.	£	£	£	£
Subscriptions and Levies	18,294		19,557	
Donations & Legacy	2,111		4,703	
Gift Aid recovered	0		0	
Special Events inc Summer of Hope	7,925		9,056	
Income from Meetings	<u>3,709</u>	32,039	<u>3,603</u>	36,919
Income from Trading Activities				
Turnover grant from MSH (2022 = 2 yrs)		742		1,283
Other Income				
Investment Income		999		284
TOTAL INCOME		<u>33,781</u>		<u>£38,486</u>
<u>EXPENDITURE</u>				
Payments to Central Mothers' Union				
Membership Subscriptions	16,400		17,108	
Donations to Mary Sumner House	30		721	
Overseas Fund	1,590		1,741	
Summer of Hope	294		253	
		18,314		19,822
Administration & Training				
Conference & Training Days	164		90	
Meeting Costs	2,494		3,578	
Insurance (2022 = 2 years)	450		880	
Office Holder Expenses	4,313		4,159	
Speakers Fees & Expenses	<u>1,285</u>	8,705	<u>1,181</u>	9,888
Other Expenses				
AFIA support			793	
Communication & Printing	2,908		1,893	
Project Support	6,266		2,907	
CDMU Website	0		800	
DBS Registration	145		145	
Branch & Deanery Admin Exps	2,127	11,447	2,867	9,405
TOTAL EXPENDITURE		<u>38,466</u>		<u>£39,115</u>
NET INCOME/ (EXPENDITURE)		-4,685		-£629
General Funds B/fwd		57,644		£58,273
General Funds C/fwd		52,959		£57,644

Carlisle Diocesan Mothers' Union
Consolidated Balance Sheet as at 31st December 2023

	<u>2023</u>		<u>2022</u>	
General Fund	£	£	£	£
CBF Deposit Account		22,047		22,047
Cash at Bank - Diocesan Account	18,736		18,063	
Cash at Bank - Branches	11,146		12,402	
Cash at Bank - Deaneries	<u>1,029</u>	30,912	<u>5,132</u>	35,597
TOTAL FUNDS (as per I&E)		<u>£52,959</u>		<u>£57,644</u>
Restricted Fund (One to Five Activities)				
Opening Balance		15,180		16,016
Less: 1 to 5 Grants and Expenses		-200		-397
Add : Investment Income		369		150
Share valuation increase/ (decrease)		415		-589
Closing Balance		<u>£15,764</u>		<u>£15,180</u>
Represented by:				
CBF Deposit Account		11,895		11,525
CBF Investment Fund		4,831		4,416
Diocesan Current Account		-962		-762
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AFIA (Away from it All) Fund				
Opening Balance Adjustment (Lloyds Bank)		3,699		
Donations and Legacies (incl Caravan)		4,361		
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Hospital Work : Providing garments for stillborn and premature babies; the provision of "Crosses in a Pocket" placed in the chapels to comfort those in trouble. The MUFFIN project provides toiletries for people admitted unexpectedly into hospital, refuges and hostels.

Links with Schools.

During the year CDMU provided "welcome bags" for parents/ carers of new school starters. Some members were also involved in the "Open the Book" project which aims to bring the Bible stories alive for children, as well as in other Christian activities.

Advocacy.

During 2023 links have been strengthened with several refuges and hospices providing "bags of care" and "Gifts of love".

Prison Work - Sadly, since the Visitors and Children's Support group of Haverigg Prison folded in November 2022, MU members have no longer been able to volunteer in the Play Area.

Efforts were still made to retain a contact with the prison in order to provide Christmas cards for prisoners.

The Trustees have considered the requirements of the Charity Commission regarding public benefit and are satisfied that the activities of Carlisle Diocese Mothers' Union meet these requirements.

Independent examiner's report to the trustees of Carlisle Diocese Mothers' Union

I report to the trustees on my examination of the accounts of Carlisle Diocese Mothers' Union (the Charity) for the year ended 31 December 2023.

Responsibilities and basis of report

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Name: Mr William Douthwaite

Address: Tidal Views, Heversham. Milnthorpe. LA7 7EW

Date: 16th July 2024

Carlisle Diocesan Mothers' Union

Consolidated Statement of Financial Activities for the year to 31st December 2023

<u>INCOME</u>	2023		2022	
Voluntary Income.	£	£	£	£
Subscriptions and Levies	18,294		19,557	
Donations & Legacy	2,111		4,703	
Gift Aid recovered	0		0	
Special Events inc Summer of Hope	7,925		9,056	
Income from Meetings	<u>3,709</u>	32,039	<u>3,603</u>	36,919
Income from Trading Activities				
Turnover grant from MSH (2022 = 2 yrs)		742		1,283
Other Income				
Investment Income		999		284
TOTAL INCOME		<u>33,781</u>		<u>£38,486</u>
<u>EXPENDITURE</u>				
Payments to Central Mothers' Union				
Membership Subscriptions	16,400		17,108	
Donations to Mary Sumner House	30		721	
Overseas Fund	1,590		1,741	
Summer of Hope	294		253	
		18,314		19,822
Administration & Training				
Conference & Training Days	164		90	
Meeting Costs	2,494		3,578	
Insurance (2022 = 2 years)	450		880	
Office Holder Expenses	4,313		4,159	
Speakers Fees & Expenses	<u>1,285</u>	8,705	<u>1,181</u>	9,888
Other Expenses				
AFIA support			793	
Communication & Printing	2,908		1,893	
Project Support	6,266		2,907	
CDMU Website	0		800	
DBS Registration	145		145	
Branch & Deanery Admin Exps	2,127	11,447	2,867	9,405
TOTAL EXPENDITURE		<u>38,466</u>		<u>£39,115</u>
NET INCOME/ (EXPENDITURE)		-4,685		-£629
General Funds B/fwd		57,644		£58,273
General Funds C/fwd		52,959		£57,644

Carlisle Diocesan Mothers' Union
Consolidated Balance Sheet as at 31st December 2023

	<u>2023</u>		<u>2022</u>	
General Fund	£	£	£	£
CBF Deposit Account		22,047		22,047
Cash at Bank - Diocesan Account	18,736		18,063	
Cash at Bank - Branches	11,146		12,402	
Cash at Bank - Deaneries	<u>1,029</u>	30,912	<u>5,132</u>	35,597
TOTAL FUNDS (as per I&E)		<u>£52,959</u>		<u>£57,644</u>
Restricted Fund (One to Five Activities)				
Opening Balance		15,180		16,016
Less: 1 to 5 Grants and Expenses		-200		-397
Add : Investment Income		369		150
Share valuation increase/ (decrease)		415		-589
Closing Balance		<u>£15,764</u>		<u>£15,180</u>
Represented by:				
CBF Deposit Account		11,895		11,525
CBF Investment Fund		4,831		4,416
Diocesan Current Account		-962		-762
		<u>£15,764</u>		<u>£15,180</u>
AFIA (Away from it All) Fund				
Opening Balance Adjustment (Lloyds Bank)		3,699		
Donations and Legacies (incl Caravan)		4,361		
Caravan Expenditure		-2,198		
Holiday Grant		-450		
Closing Balance		<u>£5,412</u>		
Represented by:				
Lloyds Current a/c		5,456		
Diocesan Current Account		-44		
		<u>£5,412</u>		

Independent examiner's report to the trustees of Carlisle Diocese Mothers' Union

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Responsibilities and basis of report

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Name: Mr William Douthwaite

Address: Tidal Views, Heversham. Milnthorpe. LA7 7EW

Date: xxxxx 16/07/2024

CARLISLE DIOCESE MOTHERS UNION

England & Wales - Charity number 1078251

Accounts

CARLISLE DIOCESE MOTHERS' UNION
REPORT AND CONSOLIDATED ACCOUNTS
FOR THE YEAR ENDED
31ST DECEMBER 2022

Registered Charity No. 1078251

Contents:

Report of the Trustees

Report of Independent Examiner

Consolidated Statement of Financial Activities

Consolidated Balance Sheet

CARLISLE DIOCESE MOTHERS' UNION
Registered Charity No 1078251
Report of the Trustees for the year ended 31st December 2022

The Trustees are pleased to submit their report and accounts for the year ended 31st December 2022

The registered address of the charity is now that of the Diocesan Treasurer : Mrs Julie Barrett,
29 Meadow Close, Lazonby, Penrith. CA10 1BF.

The Board of Trustees who served during the year ended 31st December 2022 were :

Diocesan President.

Deb Lee

Vice Presidents.

Carole Gardner

Mary Banks

Unit Co-ordinator Action and Outreach

Daphne Sisson

Deanery Leaders

Brenda Gear

Ann Wodeman

Rev Mandy Jones

Barbara Simpson

Kay Shepherd

The Board was elected from 1st January 2022 for a 3 year term.

The Diocesan President, Vice Presidents and Unit Co-ordinators are elected by members of the Diocesan Council by simple majority.

Each Deanery Leader is elected by the Branch Leaders of the Deanery.

Bankers.

Cumberland Building Society, Carlisle CA3 0JF

CARLISLE DIOCESE MOTHERS' UNION
Registered Charity No 1078251
Report of the Trustees for the year ended 31st December 2022

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The aim of the Charity is the advancement of the Christian religion in the sphere of marriage and family life.

In order to carry out this aim the objects of the Mothers' Union are:

To uphold Christ's teaching on the nature of marriage and to promote its wider understanding.

To encourage parents to bring up their children in the faith and life of the Church.

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To promote conditions in society favourable to stable family life and the protection of children.

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They shall debate, consider and determine all matters of policy and strategy to be effected on behalf of Carlisle Diocese Mothers' Union.

They shall manage and supervise the finances of the charity and and review & evaluate it's work.

They shall receive, consider and respond to all resolutions received from the Diocesan Council.

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Reserves Policy

The Trustees have reviewed the Unrestricted Reserves of the charity. This review has considered the nature of the income and expenditure streams and the need to match variable income with fixed expenditure commitments. The review has concluded that to allow the charity to be managed efficiently reserves should be kept at a level which equates to approximately 12 months of charitable expenditure.

Organisation

Carlisle Diocese Mothers' Union is autonomous and is one of the federated Mothers' Union Charities in the British Isles. As such it operates in conjunction with the central charity of the Mothers' Union based at Mary Sumner House, 24 Tufton Street, London. SW1P 3RB.

Review of the Year.

In 2022 there were 44 branches and 878 members of the Carlisle Diocese Mothers' Union.

Some members not belonging to a particular branch are Diocesan Members. The organisation, whether at Diocesan, Deanery or Branch level, aims to reach out to those in need of all ages. Communities of interest, together with Diocesan Services, all help to facilitate the work. In addition to assisting with major projects organised by the Action and Outreach Team many branches have their own "mini projects". All the work is underpinned by prayer. Carlisle Diocese is linked with 2 dioceses overseas - the Diocese of Zululand and the Diocese of Stavanger - as well as various Christian mission agencies. The Carlisle Diocese Mothers Union also has links with Boga in DR Congo, Tanga in Tanzania, Ogoni in Nigeria, Manicaland in Zimbabwe and Melbourne in Australia.

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Name: Mr William Douthwaite

Address: Tidal Views, Heversham. Milnthorpe. LA7 7EW

Date: 25.9.2023

Carlisle Diocesan Mothers' Union

Consolidated Statement of Financial Activities for the year to 31st December 2022

INCOME

	2022		2021	
	£	£	£	£
Voluntary Income.				
Subscriptions and Levies	19,557		20,275	
Donations & Legacy	4,703		1,764	
Gift Aid recovered	0		-	
Special Events inc Summer of Hope	9,056		4,537	
Income from Meetings	<u>3,603</u>	36,919	<u>2,051</u>	28,627
Income from Chraitable Activites				
A.F.I.A.				25
Income from Trading Activities				
Sales of MU Goods	0		-	
Turnover grant from MSH (2 yrs)	1,283	1,283	-	0
Other Income				
Investment Income	284		34	
Transfer from Old Marketing A/c	0	284	<u>2,882</u>	2,916
TOTAL INCOME		<u>38,486</u>		<u>£31,568</u>

EXPENDITURE

Payments to Central Mothers' Union

Membership Subscriptions	17,108		18,950	
Donations to Mary Sumner House	721		509	
Overseas Fund	1,741		1,184	
Summer of Hope	253		4,537	
		19,822	<u>-</u>	25,180

Administration & Training

Conference & Training Days	90		690	
Meeting Costs	3,578		1,287	
Insurance (2 yrs)	880		-	
Office Holder Expenses	4,159		5,513	
Speakers Fees & Expenses	<u>1,181</u>	9,888	<u>424</u>	7,914

Other Expenses

AFIA support	793		295	
Communication & Printing	1,893		1,992	
Fundraising Costs & Project Support	2,907		838	
CDMU Website	800			
DBS Registration	145			
Sundry Expenses incl Branch & Deanery Admin	2,867	9,405	1,377	4,502

TOTAL EXPENDITURE		<u>39,115</u>		<u>£37,596</u>
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NET INCOME/ (EXPENDITURE) **-£629** **-£6,028**

General Funds B/fwd **£58,273** **£64,301**

General Funds C/fwd **£57,644** **£58,273**

Carlisle Diocesan Mothers' Union
Consolidated Balance Sheet as at 31st December 2022

	<u>2022</u>		<u>2021</u>	
General Fund	£	£	£	£
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TOTAL FUNDS		<u>£57,644</u>		<u>£58,273</u>

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Opening Balance		16,016		15,738
Less: 1 to 5 Grants and Expenses		-397		-492
Add : Investement Income		150		133
Share valuation increase/ (decrease)		-589		637
Closing Balance		<u>£15,180</u>		<u>£16,016</u>
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CBF Deposit Account		11,525		11,376
CBF Investment Fund		4,416		5,005
Diocesan Current Account		-762		-365
		<u>£15,180</u>		<u>£16,016</u>

CARLISLE DIOCESE MOTHERS' UNION
REPORT AND CONSOLIDATED ACCOUNTS
FOR THE YEAR ENDED
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Registered Charity No. 1078251

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Carlisle Diocesan Mothers' Union
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Address: TIDAL VIEWS, HEVERSHAM, MILNTHORPE, LA7 7EW

Date: 25/09/2023

CARLISLE DIOCESE MOTHERS UNION

England & Wales - Charity number 1078251

Accounts

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Registered Charity No 1078251
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The Board of Trustees who served during the year ended 31st December 2021 were :

Diocesan President.

Janice Eadington

Vice Presidents.

Brenda Gear

Mary Banks

Unit Co-ordinator Action and Outreach

Daphne Sisson

Deanery Leaders

Deb Lee

Jill Richardson

Ann Wodeman

Carole Gardner

Barbara Simpson

The Board was elected from 1st January 2019 for a 3 year term.

The Diocesan President, Vice Presidents and Unit Co-ordinators are elected by members of the Diocesan Council by simple majority.

Each Deanery Leader is elected by the Branch Leaders of the Deanery.

Bankers.

Cumberland Building Society, Carlisle CA3 0JF

CARLISLE DIOCESE MOTHERS' UNION
Registered Charity No 1078251
Report of the Trustees for the year ended 31st December 2021

The purpose of the Mothers' Union is to be especially concerned with all that strengthens marriage and Christian family life.

The aim of the Charity is the advancement of the Christian religion in the sphere of marriage and family life.

In order to carry out this aim the objects of the Mothers' Union are:

- To uphold Christ's teaching on the nature of marriage and to promote its wider understanding.
- To encourage parents to bring up their children in the faith and life of the Church.
- To maintain a world-wide fellowship of Christians united in prayer, worship and service.
- To promote conditions in society favourable to stable family life and the protection of children.
- To help those whose family life has met with adversity.

Membership is open to all who have been baptised in the name of the Holy Trinity and who declare their support for the aims and objects of the Mothers' Union.

Responsibilities of the Trustees

They shall debate, consider and determine all matters of policy and strategy to be effected on behalf of Carlisle Diocese Mothers' Union.

They shall manage and supervise the finances of the charity and and review & evaluate it's work.

They shall receive, consider and respond to all resolutions received from the Diocesan Council.

Procedures are in place for the regular training of Trustees to ensure good practice and awareness of their responsibilities. Training is also given to Deanery and Branch officers at regular intervals.

Reserves Policy

The Trustees have reviewed the Unrestricted Reserves of the charity. This review has considered the nature of the income and expenditure streams and the need to match variable income with fixed expenditure commitments. The review has concluded that to allow the charity to be managed efficiently reserves should be kept at a level which equates to approximately 12 months of charitable expenditure.

Organisation

Carlisle Diocese Mothers' Union is autonomous and is one of the federated Mothers' Union Charities in the British Isles. As such it operates in conjunction with the central charity of the Mothers' Union based at Mary Sumner House, 24 Tufton Street, London. SW1P 3RB.

Review of the Year.

In 2021 there were 48 branches and 942 members of the Carlisle Diocese Mothers' Union. Some members not belonging to a particular branch are Diocesan Members. The organisation, whether at Diocesan, Deanery or Branch level, aims to reach out to those in need of all ages. Communities of interest, together with Diocesan Services, all help to facilitate the work. In addition to assisting with major projects organised by the Action and Outreach Team many branches have their own "mini projects". All the work is underpinned by prayer. Carlisle Diocese is linked with 2 dioceses overseas - the Diocese of Zululand and the Diocese of Stavanger - as well as various Christian mission agencies. The Carlisle Diocese Mothers Union also has links with Boga in DR Congo, Tanga in Tanzania, Ogoni in Nigeria, Manicaland in Zimbabwe and Melbourne in Australia.

To enable all members to be informed, a newsletter is produced and distributed 3 times a year.

During 2021 the Trustees met 3 times (once by zoom and twice face to face) and the Council met twice (once by zoom and once face to face). In the early part of the year coronavirus restrictions were still in force.

The theme for 2021 was "Rebuilding Hope and Confidence." The General Meeting of the Central Mothers' Union in September was a "virtual event" however a Diocesan Retreat was held in the autumn.

During the year the Mothers' Union marked its 145th Anniversary and on Mary Sumner Day (9th August) many diocesan members took part in "145 themed" events to raise money for the central Mothers' Union Summer of Hope appeal.

In November several members attended the Provincial end of triennium service in Liverpool Cathedral as well as the diocesan end of triennium service in Carlisle Cathedral.

Ongoing Projects :

Away from it All (AFIA) : Provides holidays, short breaks and days out for families and children who have met with adversity. This can include breaks for carers. Applications have been limited due to Coronavirus.

Prison Work : This includes caring for children in the Safe Play Area at Haverigg Prison (not possible due to covid restrictions), the provision of "Crosses in a Pocket" which were left in the Prison Chapel and Visitor Centre as well as the provision of Christmas Cards.

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The Trustees have considered the requirements of the Charity Commission regarding public benefit and are satisfied that the activities of Carlisle Diocese Mothers' Union meet these requirements.

CARLISLE DIOCESE MOTHERS' UNION
REPORT AND CONSOLIDATED ACCOUNTS
FOR THE YEAR ENDED
31ST DECEMBER 2021

Registered Charity No. 1078251

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Report of the Trustees

Report of Independent Examiner

Consolidated Statement of Financial Activities

Consolidated Balance Sheet

CARLISLE DIOCESE MOTHERS' UNION
Registered Charity No 1078251
Report of the Trustees for the year ended 31st December 2021

The Trustees are pleased to submit their report and accounts for the year ended 31st December 2021.

The registered address of the charity is now that of the Diocesan Treasurer : Mrs Julie Barrett,
29 Meadow Close, Lazonby, Penrith. CA10 1BF.

The Board of Trustees who served during the year ended 31st December 2021 were :

Diocesan President.

Janice Eadington

Vice Presidents.

Brenda Gear

Mary Banks

Unit Co-ordinator Action and Outreach

Daphne Sisson

Deanery Leaders

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Cumberland Building Society, Carlisle CA3 0JF

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Registered Charity No 1078251
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The Trustees have reviewed the Unrestricted Reserves of the charity. This review has considered the nature of the income and expenditure streams and the need to match variable income with fixed expenditure commitments. The review has concluded that to allow the charity to be managed efficiently reserves should be kept at a level which equates to approximately 12 months of charitable expenditure.

Organisation

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The Trustees have considered the requirements of the Charity Commission regarding public benefit and are satisfied that the activities of Carlisle Diocese Mothers' Union meet these requirements.

Independent examiner's report to the trustees of Carlisle Diocese Mothers' Union

I report to the trustees on my examination of the accounts of Carlisle Diocese Mothers' Union (the Charity) for the year ended 31 December 2021.

Responsibilities and basis of report

As the trustees of the Charity, 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

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.

Name:

Address:

Date:

Carlisle Diocesan Mothers' Union

Consolidated Statement of Financial Activities for the year to 31st December 2021

<u>INCOME</u>	2021		2020	
Voluntary Income.	£	£	£	£
Subscriptions and Levies	20,275		21,902	
Donations	1,764		1,081	
Gift Aid recovered	-		1,854	
Special Events inc Summer of Hope	4,537		25	
Income from Meetings	<u>2,051</u>	28,627	<u>1,271</u>	26,133
Income from Chraitable Activites				
A.F.I.A.		25		50
Income from Trading Activities				
Sales of MU Goods	-		700	
Turnover related grant from MSH	-		<u>743</u>	1,443
Other Income				
Investment Income	34		258	
Transfer from Old Marketing A/c	<u>2,882</u>	2,916	-	258
TOTAL INCOME		<u>£31,568</u>		<u>£27,884</u>
 <u>EXPENDITURE</u>				
Payments to Central Mothers' Union				
Membership Subscriptions	18,950		15,877	
Donations to Mary Sumner House	509		10,000	
Overseas Fund	1,184		-	
Summer of Hope	4,537		-	
MU Enterprise Goods	-	25,180	<u>675</u>	26,552
Administration & Training				
Conference & Training Days	690		-	
Meeting Costs	1,287		1,279	
Office Holder Expenses	5,513		4,777	
Speakers Fees & Expenses	<u>424</u>	7,914	<u>426</u>	6,482
Other Expenses				
AFIA support	295		537	
Communication & Printing	1,992		2,251	
Fundraising Costs & Project Support	838		167	
Sundry Expenses incl Branch & Deanery Admin	1,377	4,502	<u>451</u>	3,406
TOTAL EXPENDITURE		<u>£37,596</u>		<u>£36,440</u>
 NET INCOME/ (EXPENDITURE)		-£6,028		-£8,556
General Funds B/fwd		£64,301		£72,857
General Funds C/fwd		£58,273		£64,301

Carlisle Diocesan Mothers' Union
Consolidated Balance Sheet as at 31st December 2021

	<u>2021</u>		<u>2020</u>	
General Fund	£	£	£	£
CBF Deposit Account		22,047		22,047
Cash at Bank - Diocesan Account	21,209		25,657	
Cash at Bank - Branches	10,091		11,624	
Cash at Bank - Deaneries	<u>4,926</u>	36,226	<u>4,973</u>	42,254
TOTAL FUNDS		<u>£58,273</u>		<u>£64,301</u>

Restricted Fund (One to Five Activities)

Opening Balance		15,738		16,893
Less: 1 to 5 Grants and Expenses		-492		-1,726
Add : Investement Income		133		48
Share valuation increase/ (decrease)		637		523
Closing Balance		<u>£16,016</u>		<u>£15,738</u>
Represented by:				
CBF Deposit Account		11,376		11,370
CBF Investment Fund		5,005		4,368
Diocesan Current Account		-365		
		<u>£16,016</u>		<u>£15,738</u>

Independent examiner's report to the trustees of Carlisle Diocese Mothers' Union

I report to the trustees on my examination of the accounts of Carlisle Diocese Mothers' Union (the Charity) for the year ended 31 December 2021.

Responsibilities and basis of report

As the trustees of the Charity, 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 giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

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.



Name: BILL MADDAMS
Address: 2 BEACON GARDENS
PENRITH CA11 8BE
Date: 27TH AUGUST 2022

CARLISLE DIOCESE MOTHERS UNION

England & Wales - Charity number 1078251

Accounts

MU Council 13/10/21

Item 3

CARLISLE DIOCESE MOTHER'S UNION

REPORT AND CONSOLIDATED ACCOUNTS

For the Year Ended

31st December 2020

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5	Report of Independent Examiner
6	Consolidated Statement of Financial Activities
7	Consolidated Balance Sheet
8	Notes forming part of the Financial Statements

CARLISLE DIOCESE MOTHERS' UNION

Registered Charity No 1078251

Report of the Trustees for the year ended 31 December 2020

The Trustees are pleased to submit their report and accounts for the year ended 31 December 2020

The address of the Society is now that of the Diocesan President: Janice Eadington:
62 Bigland Drive, ULVERSTON LA12 9PD

Board of Trustees who served during the year ended 31 December 2020

Diocesan President

Janice Eadington

Vice Presidents

Brenda Gear

Mary Banks

Unit Co-ordinator, Action and Outreach

Daphne Sisson

Deanery Leaders

Edna Walmsley/Kay Shepherd. (We were sorry to report the death of Edna Walmsley in July 2020)

Deb Lee

Jill Richardson

Ann Wodeman

Carole Gardner

Barbara Simpson

The new Board was elected from 1 January 2019. The majority of the members of the new Board were re-elected, with duties held by individual Trustees being allocated as per the election results.

The Diocesan President, Vice-Presidents, and Unit Co-ordinators are elected by Members of the Diocesan Council by simple majority.

Each Deanery Leader is elected by the Branch Leaders of the Deanery.

Bankers: Cumberland Building Society, Carlisle CA3 0JF

CARLISLE DIOCESE MOTHERS' UNION

The purpose of the Mothers' Union is to be especially concerned with all that strengthens marriage and Christian family life.

The Aim of the Society is the advancement of the Christian religion in the sphere of marriage and family life.

In order to carry out this Aim the Objects of the Mothers' Union are:

- 1 To uphold Christ's teaching on the nature of marriage and to promote its wider understanding
- 2 To encourage parents to bring up their children in the faith and life of the Church
- 3 To maintain a world-wide fellowship of Christians united in prayer, worship and service
- 4 To promote conditions in society favourable to stable family life and the protection of children
- 5 To help those whose family life has met with adversity.

Membership is open to all who:

- a) Have been baptised in the name of the Holy Trinity
- b) Declare their support for the aims and objects of the Society.

Responsibilities of the Trustees

They shall debate, consider and determine all matters of policy and strategy to be effected on behalf of Carlisle Diocese Mothers' Union.

They shall manage and supervise the finances of the Society and review and evaluate the work of the Society.

They shall receive, consider and respond to all resolutions received from the Diocesan Council.

Procedures are in place for the regular training of Trustees to ensure good practice and awareness of their responsibilities. Training is also given to Deanery and Branch officials at regular intervals.

The Trustees have undertaken a review of the major risks which the Society faces. They have taken steps to establish procedures to manage and mitigate them.

Reserves Policy

The Trustees have reviewed the Reserves of the Society. This review considered the nature of the income and expenditure streams, the need to match variable income with fixed commitments and the nature of the Reserves. The review concluded that to allow the Society to be managed efficiently we should aim to keep Reserves at their present level, which equates to approximately 12 months of charitable expenditure.

Organisation

Carlisle Diocese Mothers' Union is autonomous and is one of the federated Mothers' Union Charities in the British Isles. As such it operates in conjunction with the central charity of the Mothers' Union at Mary Sumner House, 24 Tufton Street, London, SW1P 3RB

In 2020 there were 55 branches and 1100 members of the Mothers' Union in the Diocese. Some members, not belonging to a specific branch, are Diocesan members. The organisation, whether at Diocesan, Deanery or Branch level, aims to reach out to those in need of all ages. Communities of Interest, together with Diocesan Services, all help to facilitate the work. In addition to assisting with major projects organised by the Action and Outreach Team many branches have their own 'mini' projects. All the work is underpinned by prayer. Carlisle Diocese is linked with 5 dioceses overseas and one diocese in Britain, and tries to keep in touch with them.

To enable all members to be well informed, a newsletter is produced and distributed three times a year.

Three meetings of the Trustees and two meetings of the Diocesan Council were held. **Due to Coronavirus restrictions**, only the February Trustees and March Council meetings were held face to face, the others conducted via e mail. Our planned Sharing Day was cancelled.

The theme for the year was "Building Hope and Confidence". An ideas leaflet had been produced with suggestions to help with branch meetings. However, face to face meetings had to be cancelled due to Coronavirus restrictions, although some members managed to meet virtually. In April, a Quiet Day was held via Facebook instead of in person. The General Meeting due to be held in Belfast in September was cancelled, as was the planned November retreat.

The Trustees have considered the requirements of the Charity Commissioners regarding public benefit and are satisfied that the activities of the Carlisle Diocese Mothers' Union meet these requirements.

Ongoing Projects

1. **Away From It All** - holidays, short breaks and days out for families and children who have met with adversity - can include breaks for carers. Applications were limited this year because of Coronavirus.
2. **Prison Work** - caring for children in the Safe Play Area at Haverigg Prison, not possible during the pandemic. 'Crosses in a Pocket' were made and left in the Prison Chapel and Visitor Centre, which were much appreciated. Provision of Christmas cards for all prisoners.
3. **Hospital Work** - providing garments for stillborn and premature babies and "Crosses in a Pocket" placed in the chapels to comfort those in trouble. Additional gifts this year of paired hearts, scrubs bags, provided to help in the Coronavirus situation. The MUFFIN project provides toiletries for people admitted unexpectedly into hospital, refuges and hostels.
4. **Work with the elderly** - the Outreach Choir was unable to give planned short concerts in Residential Homes due to Coronavirus restrictions. No visiting could be carried out.
5. **Work with young people** - Schools work mainly put on hold because of the Coronavirus situation. Some books donated at Christmas and gift bags given for staff.
6. **The One to Five Bursary Fund** - gives grants to support Christian nurture work with children and young people.

Independent examiner's report to the Trustees of Carlisle Diocese Mothers' Union

I report on the accounts of the Carlisle Diocese Mothers' Union for the year ended 31 December 2020, which are set out on pages 64 to 8.

Respective responsibilities of trustees and examiner

The Charity's trustees are responsible for the preparation of the accounts. The Charity's trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed. It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedures laid down in the General Directions given by the Charity Commissioner under section 145 (5) (b) of the 2011 Act; and
- to state whether particular matters have come to my attention.

Basis of independent examiner's report

The examination was carried out in accordance with the General Directions given by the Charity Commissioner. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and the seeking of explanations from you as trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- which gives me reasonable cause to believe that, in any material respect, the requirements:
 - (a) to keep accounting records in accordance with section 130 of the 2011 Act; and
 - (b) to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the 2011 Act have not been met; or
- to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Name of principal: Andrew Molyneux

Address: 6 Leicester Avenue, Liverpool, L22 2BA

Date: 24 October 2021

**Carlisle Diocese Mothers' Union
Consolidated Statement of Financial Activities for the year ended 31 December 2020**

Voluntary Income		2020		2019	
Subscriptions, levies and insurance		21,902		22,216	
Donations		1,081		3,897	
Gift Aid Recovered		1,854		3,562	
Special Events	1	25		1,473	
Outings and Visits	1	-		3,495	
Income from Meetings	1	1,271	26,133	4,679	39,322
		<hr/>		<hr/>	
Income from Charitable activities					
AFIA		50		554	
Other		-	50	-	554
		<hr/>		<hr/>	
Income from Trading Activities					
Magazine Subscriptions		-		-	
Sale of Mothers' Union Goods	2	700		687	
Turnover Related Grant - Head Office	3	743	1,443	765	1,452
		<hr/>		<hr/>	
Investment Income			258		320
		<hr/>		<hr/>	
TOTAL INCOME		27,884		41,648	
		<hr/>		<hr/>	
EXPENDITURE on					
Charitable Activities					
AFIA		537		475	
Other		-	537	-	475
		<hr/>		<hr/>	
Payments to Central Mothers' Union					
Membership Subscriptions		15,877		18,323	
Donations	4	10,000		3,806	
MUe Goods	2	675	26,552	521	22,650
		<hr/>		<hr/>	
Administration and Training					
Conferences and Training days		-		-	
Meeting Costs	1	1,279		4,116	
Reimbursement of Office Holders Expenses	5	4,777		7,343	
Administration		426	6,482	666	12,125
		<hr/>		<hr/>	

Other Expenses

Communication and Printing		2,251		2,353	
Cost of Fundraising		167		225	
Outings and Visits	1	-		3,472	
Sundry Expenses		451	2,869	1,718	7,768
TOTAL EXPENDITURE			<u>36,440</u>	<u>43,018</u>	
NET INCOME/(EXPENDITURE)			(8,556)	(1,370)	
TOTAL FUNDS BROUGHT FORWARD			<u>96,343</u>	<u>97,713</u>	
TOTAL FUNDS CARRIED FORWARD			<u>87787</u>	<u>96,343</u>	

**Carlisle Diocese Mothers' Union
Consolidated Balance Sheet as at 31 December 2020**

	2020		2019	
General Fund				
Investment Income				
Diocesan CCLA Deposit Account	22,047	22,047	22,047	22,047
Cash at Bank and in Hand				
Branches and Deaneries	11,236		16,190	
Diocesan	25,657	36,893	29,557	45,747
FUND BALANCES - GENERAL FUND		58,940		67,794
Restricted Fund				
One to Five Bursary Fund				
One to Five General Fund	-		107	
CBF Investment Fund	4,368		3,451	
		4,368		3,558
Cash at Bank and in Hand				
One to Five bank Account	-		2,035	
One to Five CBF Deposit Account	11,370		11,300	
		11,370		13,335
FUND BALANCES - ONE TO FIVE FUND		15,738		16,893
TOTAL FUND BALANCES		74,678		84,759

Carlisle Diocese Mothers' Union**Notes forming part of the Financial Statements for the year ending 31 December 2020**

	2020	2019
1 Income from Special Events, Outings and Meetings		
General Meeting	-	-
Other Special Events	25	1,473
Other Outings	-	3,495
Branch and Deanery Meetings	1,271	4,679
	<hr/>	<hr/>
	1,296	9,647
Expenses relating to Special Events		
General Meetings related expenses	-	-
Cost of Other Outings	-	(3,472)
Branch/Deanery/Diocesan Meetings	(1,279)	(4,116)
Speakers Fees	(426)	(2,749)
	<hr/>	<hr/>
	(1,705)	(10,337)
2 Mothers' Union Goods		
Income from sale of goods	700	687
Purchases from MU Enterprises	(675)	(521)
Purchase of Calendars	-	-
	<hr/>	<hr/>
	25	166
3 Turnover Grant		
Purchases from Central Trading Company, MU Enterprises Ltd., which are sold through Carlisle Diocese Mothers' Union and its Deaneries and Branches, attract a 10% payback known as Turnover Related Grant. Carlisle Diocese Mothers' Union received £743 (2019 - £765) for its contribution to this activity, the profits of which supports the work done through the Central Mothers' Union.	743	765
4 Monies sent to Central Mothers' Union		
Overseas Fund	-	2,498
Britain & Ireland Fund	-	100
Relief Fund	-	173
Other	10,000	1,035
	<hr/>	<hr/>
	10,000	3,806
5 Reimbursement of Officeholders Expenses		
Diocesan President	800	1,381

Diocesan Secretary	1,500	2,141
Diocesan Treasurer	1,600	1600
Other	877	2,221
	<hr/>	<hr/>
	4,777	7,343