

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT

England & Wales · Charity number 1145602

Details

Status	Registered
Legal form	Previously excepted
Registered	2012-01-24
Register	View on the Charity Commission register

Contact

Address	Circuit Resource Centre Batley Methodist Church Commercial Street Batley Batley West Yor
Phone	01924480382
Email	icca24wilsonwra@hotmail.com
Website	www.methodist.org.uk

Activities

Objects: THE PURPOSES OF THE METHODIST CHURCH ARE AND SHALL BE DEEMED TO HAVE BEEN SINCE THE DATE OF UNION THE ADVANCEMENT OF -(A) THE CHRISTIAN FAITH IN ACCORDANCE WITH THE DOCTRINAL STANDARDS AND THE DISCIPLINE OF THE METHODIST CHURCH;(B) ANY CHARITABLE PURPOSE FOR THE TIME BEING OF ANY CONNEXIONAL, DISTRICT, CIRCUIT, LOCAL OR OTHER ORGANISATION OF THE METHODIST CHURCH;(C) ANY CHARITABLE PURPOSE FOR THE TIME BEING OF ANY SOCIETY OR INSTITUTION SUBSIDIARY OR ANCILLARY TO THE METHODIST CHURCH;(D) ANY PURPOSE FOR THE TIME BEING OF ANY CHARITY BEING A CHARITY SUBSIDIARY OR ANCILLARY TO THE METHODIST CHURCH.

Activities: Provision of regular public acts of worship open to members of church and non members..23 Churches available for prayer, contemplation,pastoral support visiting sick and beareved. We work with schools, youth elderly,supporting socially disadvantaged. Support other charities in both the UK and overseas financially and with prayer. Teaching of christianity through sermons, courses/small groups.

Classification

- **How:** Acts As An Umbrella Or Resource Body
- **What:** Religious Activities
- **Who:** The General Public/mankind

Geography

- Bradford City
- Kirklees
- Leeds City

Finances

Period end	Income	Expenditure	Assets	Employees
2025-08-31	£487,081	£489,789	-	-
2024-08-31	£421,516	£417,844	-	-
2023-08-31	£368,895	£389,459	-	-
2022-08-31	£373,869	£390,999	-	-
2021-08-31	£449,000	£428,000	-	-
2020-08-31	£445,588	£460,430	-	-

Trustees

Name	Role	Appointed
Annette Elaine Hutchinson		2015-09-01
Antony Curry		2016-09-01
Barbara Christine Yelland		2015-09-01
Barbara Sutton		2022-09-01
CAROLINE JANE HOLT		2012-01-24
Christine Edmond		2022-09-01
Christopher James Reece		2021-09-01
DAVID PATTISON		2011-09-01
DOROTHY RYAN		2011-09-01
David James Hall		2022-09-01
Donna Johns		2024-09-01
Douglas Perry		2012-09-01
Dr Paul Pratt		2013-09-01
ELIZABETH SANDS		2012-01-19
HARRY EASTWOOD		2011-09-01
Heidi Curry		2025-08-01
IAN WILSON		2012-01-24
Ian Brooke-Mawson		2025-08-01
Ian Keith Caveen		2022-09-01
JACK RAYMOND TODD		2011-09-01
JEANETTE OLDROYD		2020-09-01
JENNIFER ELIZABETH KING		2011-09-01
James Stewart High		2020-09-01
Joanne Margaret Gibson		2021-09-01
John Dennis Wilson		2021-09-01
Joseph Jones		2021-09-01
Joy Ann Mary Coates		2020-09-01

Name	Role	Appointed
Judith Mary Crowther		2019-01-01
KEITH DIXON		2011-09-01
Keith Webster		2025-08-01
Linda Margaret Crossley		2011-09-01
Linda Wilson		2024-09-01
Margaret Christine Webster		2023-09-01
Margaret Martin		2024-09-01
Marsia Brancken		2017-09-01
Nicola Abbott		2017-09-01
PETER GRAHAM		2012-01-19
REVEREND JOHN ANTHONY SANTRY		2012-01-24
RICHARD ELWYN EVANS		2022-09-01
ROGER WINTERBURN		2012-01-24
Rev Alex Yesudas		2020-09-01
Rev Arnold Godfrey Nicholson		2020-09-01
Rev Christine Audrey Hawke		2012-09-01
Rev David John Barker		2022-09-01
Rev Jane Rosalind Parker		2011-09-01
Rev John Anthony Santry		2011-09-01
Rev Keith Martin Pratt		2011-09-01
Rev Marian Lorraine Olsen		2021-09-01
Rev Nicholas Cutts		2021-09-01
Rev Raymond Kipling Coates		2016-09-01
Ruth Cole		2025-08-01
Ruth Gibson		2025-08-01
SARA LEWIS		2012-01-24
Susan Lesley Evans		2011-09-01
Sylvia June Cordner		2017-09-01

Name	Role	Appointed
TERENCE HALLSWORTH		2012-01-24
TERENCE PATTERSON		2012-01-24
Victoria Pratt		2022-09-01

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT

England & Wales - Charity number 1145602

Accounts

North Kirklees and Morley Methodist Circuit Trustees' Annual Report and Financial Statements For the Year Ended 31 August 2025

1. Reference and Administrative Details

- **Circuit Name:** North Kirklees and Morley Methodist Circuit
- **Charity Number:** 1145602
- **Principal Office:** Circuit Office -Batley Central Methodist Church – Commercial Street Batley WF17 5DS
- **Managing Trustees:** Members of the Circuit Meeting
- **Independent Examiner:** Mark Gibson
- **Bankers:** Cooperative Bank – Central Finance Board of Methodist Church and Trustees for Methodist Church Purposes (TMCP)

2. Structure, Governance and Management

The Circuit operates under the Methodist Church Act 1976 and the Deed of Union. Governance is exercised through the Circuit Meeting, which includes representatives from each local church. The Circuit is a registered charity and complies with the Methodist Church's constitutional practice and discipline.

3. Objectives and Activities

The principal aim of the Circuit is to advance the Christian faith through worship, mission, pastoral care, and community outreach. Activities include:

- Supporting local churches in worship and discipleship
- Providing ministerial and lay leadership
- Maintaining church properties and manses
- Facilitating youth work, chaplaincy, and ecumenical engagement

Public benefit is demonstrated through open worship services, community programmes, and charitable giving.

4. Achievements and Performance

- Supported four presbyters.
- Increased Circuit Office staffing to provide additional support for Ministers, Circuit, and local churches.

- Completed major roof repairs at Shaw Street Mande
- Upgraded Lee Green Manse to a standard that made it an attractive rental proposition.
- Funded general property upgrades.
- Got on top of the backlog of quinquennial inspections.
- Covered shortfall in annual budget to reduce increased assessment impact on Churches.
- Grants and Loans awarded.

5. Financial Review

Breakdown of Income and Expenditure=2024-2025

					2024/2025
Donations and Legacies					
Circuit Model Trust Interest					13647.07
Other Trust Funds- interest					11705.33
TOTAL					25352.4
Assessments on Churches					
Batley					30348.95
Morley					32073.75
Churwell					9252.5
Birkenshaw					12366.25
St Andrews Mirfield					25172
Trinity-					27229.5
Drighlington					19994
Cleckheaton					35721
St Andrews Liversedge					19235.5
Gomersal					10631.25
Birstall					15644
Westborough					11712.75
West Ardsley					28070.5
Longcausewy					12500
Tingley					22000
					311951.50
Other Charitable Income					
General Funds Interest					2,925.01
Connexional Funds/Donations					1171.10
Other income					9559.51
CRC-Income					1500
Gildersome Income					14329.67

Newlands Income				8293.5
TOTAL				37778.79
Grants and Donations				
Budget Shortfall			Model Trust	50000
Drighlington- Loan	Paid direct to Drigh		Model Trust	200000
Shaw Street Manse Roof			Model Trust	13458
Lee Green Manse Upgrade			Model Trust	14000
Manse and other Property Upgrade			Model Trust	35000
TOTAL				312458
Salaries and Associated Costs				
Stipends-Levy and Apprenticeship Costs				168,288.32
CRC Salaries				42862.19
Ministers Travel				7019.22
Telephone Broadband				9041.6
LP Costs				375
Supernumery Costs				2671
TOTAL				230257.33
Property Maintenance				
Manses- Council Tax				15,215.93
Manses- Water Rates				3966.08
Manses- Insurance				5906.67
Maintenance Costs				45492.98
Alarm/ Heating				1039
Church Property Costs				2384.83
Hanging Heaton Exp				24896.19
TOTAL				98901.68
Connexional and Model Trust Levy				
District Levy			Model Trust	30424.44
TMCP Admin Costs			Model Trust	1697.56
TOTAL				32122
Admin Costs			Other Trusts	1782.71
Office Costs				

6. Property and Assets

- Four occupied manses
- As at 31/8/25 we had two un- occupied manses – Subsequently from September 2025 Lee Green is now occupied as a rental asset and Old Bank Road Dewsbury may have been sold by the time you read this report- After the Connexional Levy has been deducted proceeds of sale will go into Model Trust
- Circuit Trustees have on going responsibility for Gildersome, Newlands. Howden Clough and Hanging Heaton
- All properties are insured and maintained in accordance with TMCP guidance.
- A robust quinquennial inspection plan is in place for all churches and properties.

7.Plans for future

- Supporting Churches with a grant to improve their IT capabilities
- Support local churches with mission planning and property projects.
- Invest in youth -providing annual grant etc.
- Continue general property upgrades and energy efficiency measures.
- Lay-worker Mission Enabler to be appointed!

8. Statement of Trustees' Responsibilities

The trustees are responsible for preparing the financial statements in accordance with applicable law and Methodist Church guidance. They confirm that:

- Proper accounting records have been kept.
- Financial statements give a true and fair view.
- The charity complies with the Charities Act 2011

Ian Wilson-North Kirklees and Morley Circuit Treasurer

24th October 2025

Reserves Policy

North Kirklees and Morley Circuit

Approved by the Circuit Meeting: [Insert Date]

Purpose of the Policy

This policy sets out the North Kirklees and Morley Circuit's approach to holding and managing financial reserves. It ensures that the Circuit maintains sufficient funds to meet its obligations, support its mission, and respond to unforeseen challenges, while demonstrating responsible stewardship of charitable resources.

The Circuit maintains a reserves policy to ensure sufficient funds for operational continuity and unforeseen property costs. The target reserve level is £250,000, which has been met and exceeded this year.

Definition of Reserves

Reserves are unrestricted funds that are freely available to spend on the charity's objectives. They exclude:

- Restricted funds (designated for specific purposes)
- Endowment funds
- Fixed assets (e.g. property held under Model Trusts)
- Funds already committed to future expenditure

Policy Objectives

The Circuit holds reserves to:

- Ensure continuity of ministry and mission.
- Cover unexpected shortfalls in income or increases in expenditure.
- Provide for urgent property repairs or compliance costs.
- Support strategic development and investment in outreach.

Target Reserve Level

The Circuit aims to maintain unrestricted reserves equivalent to:

- **Six months of core operating costs**, including stipends, property maintenance, and administrative expenses-.

- **Estimated emergency property costs**, based on recent quinquennial inspections.
- **Contingency for mission initiatives**, such as youth work or digital ministry

. Monitoring and Review

- The Circuit Leadership Team and the Circuit Meeting review the reserves level annually.
- Any significant variance from the target level will prompt a review of income, expenditure, and budgeting priorities.
- The policy itself is reviewed annually and updated as needed.

. Use of Excess Reserves

Where reserves exceed the target level, the Circuit may allocate funds to:

- Strategic mission projects
- Property improvements
- One-off grants to local churches or partner organisations
- Investment in staff development or digital infrastructure

All allocations must be approved by the Circuit Meeting and recorded in the minutes.

. Compliance and Transparency

This policy complies with guidance from:

- The Charity Commission (CC19: Charities and Reserves)
- The Methodist Church of Great Britain
- Trustees for Methodist Church Purposes (TMCP)

The reserves position is disclosed annually in the Trustees' Report and Financial Statements.

Ian Wilson

North Kirklees and Morley Circuit Treasurer

24th October 2025

NOTES TO NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT ACCOUNTS-SFA 2024-2025

	2024/25	2023/24
NOTE 1 Donations and Legacies		
Circuit Model Trust Interest	13647.07	17986.98
Proceeds sale of 7 Whittaker Street		70095.8
Proceeds sale of 16 Leyburn Avenue		346965.91
Other Trust Funds- interest	11705.33	12893.93
TOTAL	25352.4	447942.6
NOTE 2 Assessments on Churches		
Batley	30348.95	33664.75
Morley	32073.75	30917.5
Churwell	9252.5	9751.25
Birkenshaw	12366.25	12653.25
St Andrews Mirfield	25172	26685.75
Trinity-	27229.5	12400
Drighlington	19994	19280
Cleckheaton	35721	34020
St Andrews Liversedge	19235.5	18320
Gomersal	10631.25	10125
Birstall	15644	15211.25
Westborough	11712.75	11876
Hanging Heaton		1801.28
West Ardsley	28070.5	28020
Longcausewy	12500	12500
Tingley	22000	18000
	311,951.50	293,226.03
NOTE 3 Other Charitable Income		
General Funds Interest	2,925.01	3,917.90
Connexional Funds/Donations	1,171.10	1,134.16
Other income	9,559.51	43,237.48
CRC-Income	1500	
Gildersome Income	14,329.67	
Newlands Income	8293.5	
TOTAL	37778.79	48289.54
NOTE 4 Grants and Donations		
Manse Property Costs/ Circuit Support	Model Trust	80000
Budget Shortfall	Model Trust	50000
Drighlington- Loan Paid direct to Drigh	Model Trust	200000
Shaw Street Manse Roof	Model Trust	13458
Lee Green Manse Upgrade	Model Trust	14000
Manse and other Property Upgrade	Model Trust	35000
Drighlington- Grant	Model Trust	100000
TOTAL	312458	180000
NOTE 5 Salaries and Associated Costs		
Stipends-Levy and Apprenticeship Costs	168,288.32	200,195.32
CRC Salaries	42862.19	23978.6

Ministers Travel	7019.22	7735.95
Telephone Broadband	9041.6	9556.5
LP Costs	375	659.3
Supernumery Costs	2671	4015.5
TOTAL	230257.33	246141.17

NOTE 6 Property Maintenance

Manses- Council Tax	15,215.93	15,689.90
Manses- Water Rates	3966.08	2025.66
Manses- Insurance	5906.67	6594.43
Maintenance Costs	45,492.98	12,305.32
Alarm/ Heating	1039	986
Church Property Costs	2384.83	3415.66
Hanging Heaton Exp	24896.19	22518.63
TOTAL	98901.68	63535.6

NOTE 7 Connexional and Model Trust Levy

District Levy	Model Trust	30424.44	147232.6
TMCP Admin Costs	Model Trust	1697.56	1184.73
TOTAL		32122	148417.33

Admin Costs	Other Trusts	1782.71	1796.97
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NOTE 8 Office Costs

CRC Expenses	14666.54	10094.57
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NOTE 9 Other Outgoings

Other Expenditure	37804.32	9438.14
Connexional Funds/ Circuit Collections	1,171.10	1134.16
Youth Work		1764.3
Gildersome Expenditure	11709.2	
Newlands Expenditure	8280.73	
TOTAL	58965.35	12336.6

NOTE 10 Fixed Assets- Manse Vaiuations-Occupied-Taken from Methodist Insurance property valuation

12 Stockwell Drive Batley	674078	643815
Lee Green Mirfield	538120	513961
6 Shaw Street Cleckheaton	552136	527349
579 Bradford Road Cleckheaton	488790	466846
4 Longwood Road Tingley	472020	450829
TOTAL	2725144	2602800

NOTE 11 Fixed Assets- Manse Valuation- Currently gaining rental income-Taken from Methodist Insurance

146 Old Bank Road Mirfield	432513	412095
TOTAL	432513	412095

property valuation

Name of CircuitNorth Kirklees and Morley
Circuit..... No...27/36.....

Declarations and Scrutiny

I confirm that these accruals-based accounts for the year to 31 August 2025 have been prepared from the records of the Circuit and that they include all funds under the control of the Circuit meeting.

Ian Wilson

Signature of treasurer
Date.....20/10/2025.....

Name and address of treasurer5 Parkfield Avenue
Mirfield.....

..... Post Code.....WF14
9HJ.....

Presentation to the Circuit meeting

I confirm that the annual report and accounts for the year ended 31 August 2025 were/will * be presented to the Circuit meeting held on: ...13/11/25.....

Signature of the Chair of the meeting: ...Rev Marian
Olsen.....

Name of the Chair of the meeting:Rev Marian OLsen..... Date
.....13/11/25.....

Independent Examiner's Report to the Trustees of the North Kirklees and Morley Circuit

Charity Number

Responsibilities and basis of report

I report to the trustees on my examination of the accounts of the
Circuit for the year ended 31 August 2025 set out on pages ... to As the Circuit'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 Circuit's accounts carried out under section 145 of the 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.

* delete or circle as appropriate

Name of CircuitNorth Kirklees and Morley
..... No27/36.....

Independent Examiner's Statement-Waiting final sign off

[The Circuit's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of (*insert name of applicable listed body*)]. *Delete [] if not applicable.*

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below*) which give me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Act; or
- the accounts do not accord with the accounting records; or
- the accounts do 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 *Delete if not applicable i.e. all R&P accounts*
- the trustees' annual report is not consistent with the accounts *Delete if not applicable i.e. all R&P accounts.*

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.

I have/have not* obtained independent verification of all investments with the Trustees for Methodist Church Purposes or held in other trusts, bank balances and funds at the Central Finance Board of the Methodist Church which are individually in excess of £10,000 (ten thousand pounds) at the balance sheet date.

Signature of independent examiner

Name of independent examiner:

Relevant professional qualification of independent examiner:

Name of firm (where appropriate):

Address:

..... Post Code:

Date:

* delete or circle as appropriate

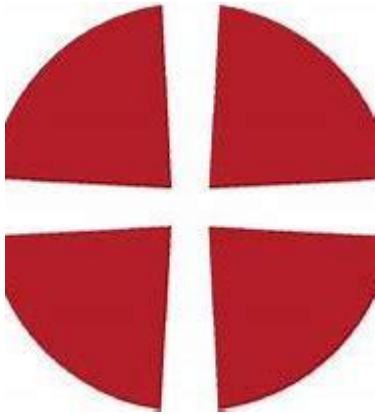
NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT

England & Wales - Charity number 1145602

Accounts

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT

Registered Charity No-1145602



REPORT AND FINANCIAL STATEMENTS FOR THE YEAR
ENDED 31 AUGUST 2024

RESERVES POLICY 2024/2025

Structure

The North Kirklees and Morley Circuit is part of the Yorkshire West District.

The Circuit functions in accordance with the Constitution, Practice and Discipline (CPD) of the Methodist Church, often referred to as the Connexion.

Names of the charity trustees

The number of trustees fluctuates during the year depending on changes in office holders in the churches and Circuit. There was an average of forty trustees listed on the Charity Commission website during this year.

They are appointed by local churches and existing trustees; Ministers are automatically trustees.

In accordance with the CPD of the Methodist Church, the Chair is Rev Marian Olsen the Superintendent Minister of the Circuit, who was appointed on 1 September 2022.

The charity governing document is the Deed of Union (1932) and Methodist Church Act (1976)

The Circuit trustees meet four times each year (the Circuit Meeting).

The Circuit Leadership Team (CLT) consisting of the Circuit Stewards, Staff and other Circuit Officers meet monthly and cover the day-to-day management of the Circuit.

Circuit Administration activities are undertaken by two members of staff who are based at Batley Central Methodist Church

These financial statements comply with the charity's governing document, which being the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice.

This is applicable to all charities who prepare their accounts in accordance with the Financial Reporting Standard applicable in the UK and Ireland published in October 2019.

The Circuit is responsible for

- The Ministerial oversight and pastoral care of the 15 local churches in the circuit
- The support of a ministry team of 4 Presbyters
- Two administrative members of staff
- Payment of the Circuit contribution to the District and Connexion, of which a significant part is used to fund the work of the wider Methodist Church
- Maintenance of 6 Circuit Manses
- Upkeep and maintenance of empty Circuit Properties pending sale/ future decisions -Hanging Heaton / Old Bank Road Dewsbury and Mirfield Manse
- Other miscellaneous costs

Financial Review 2023/2024

The Circuit Accounts includes:

- **The General Fund** is the main operating account through which the expenditure and revenue for both operational and strategic purposes are managed. As such we have accounts with the Co-operative Bank and Central Finance Board
- The purpose of the fund is to secure and maintain the Circuits viability and future.
- To enable the Circuit to fulfil its Mission Policy

- The financial affairs of both **Gildersome and Newlands** are administered through the General Fund – all transactions are recorded separately, and balance sheets included in this report.
- The total income of the General Fund in 2023/24 was £421,515.57 (£368,895 in 2022/23) – Total expenditure in 2023/24 was £417,843.92 (£389,459 in 2022/23)

- Net increase in 2023/24 was £3,671.65 (deficit of £20,540 in 2022/23)

- **Balance carried forward to 2024/25 is £55,539.54**

- A full balance sheet is included in this report.

- **Circuit Model Trust**- This fund derives from sales of Churches and other Circuit properties such as Manses. Monies are held at TMCP.

- Following changes to Standing Orders in 2009 Circuit Model Trust Funds are now categorised as unrestricted funds and may be used for property, mission and outreach. Every year the balance in the fund incurs a levy towards the District Advance Fund. The first £100,000 is subject to a 2½ %, levy £100,000-- £250,000 is at 5 %.and anything over £250.000 at 7.5%

- In 2023/24 this levy came to £22,427.08- There is also an administration fee that TMCP impose – for 2023/24 this was £1184.73

During 2023/24 two properties were sold – They were

- 7 Whittaker Street Batley Carr- Total sale £70,095.80- £10,019.16
connexional levy was paid into the trust
- 16 Leyburn Road (old Morley Manse) - Total sale £346,965.91-- £114,786.36
connexional levy was paid into the trust

- In addition, the fund attracted total interest of £17,986.98

- The following withdrawals were made from the trust in 2023/24
- To support our Churches with their assessments we withdrew £80,000 from
our Circuit Model Trust to cover the shortfall in the budget
- Grant of £100,000 which was awarded to Drighlington back in 2022 was
claimed

- **Balance of the Circuit Model Trust as at 31/8/2024 is £522,325.80**

- Please note that this figure does not include the loan of £200,000 that was
awarded to Drighlington at the September 2024 Circuit Meeting

- A full breakdown is included in this report.
-
- The Circuit also has several **Other Trusts** Again they are held at TMCP-
These are mainly as a result of Church closures and funds moving across to
the Circuit. Whilst they have their own specific 'terms and conditions' they are
in effect model trusts and can be used for property, mission and outreach.
- They all gain interest and attract an administration charge.

- **Total balance of these funds at 31/08/2024 was £ 247,381.40-**

- Again, a full breakdown is included in this report.

- The Circuit has one **Endowment fund** -The capital sum must be retained,
and we receive a very nominal amount of interest.

-

- **Fixed Assets** – For us these are now 6 manses – Using the valuations
applied by Methodist Insurance this equates to £3,014,895 (£3 m)

General Comments

- This was the second year that we used the new formula for calculating individual **Church Assessments**
- It is not perfect – but I am sure that we all agree that it is a much fairer model than what we had previously
- As a reminder the calculation formula is based on 50% membership and 50% on attendance. These figures taken from those declared at the October count.
- As the formula can potentially lead to annual variations a maximum 5% cap increase is in place.

- As you will be aware from late August 2024 we welcomed Victoria Pratt to the Circuit Office Team – Whilst very much a partnership with Judith her specific role is to provide HR and Financial Support to local churches – Very much a work in progress – so watch this space

- In respect the 2024/25 we are forecasting a **£50,000 shortfall** – Circuit Meeting has previously agreed that if required we should withdraw from Circuit Model Trust to plug this gap.

- Unfortunately, a reduction in staffing will not see a reduction in the overall amount (including assessments) that we need to raise going forward – like us all the church is not immune from general cost of living increases – including stipends and other salary costs.

- We are fortunate to have monies in Model Trusts that we can draw upon – and the likelihood is that in the short term this amount will increase with the sale of other circuit properties.

- Thank you to all the Church Treasurers for all the work you do – I fully appreciate the challenges of the role in the current climate – if Victoria or myself can help in any aspect please get in contact

Ian Wilson

North Kirklees and Morley Circuit Treasurer

30th October 2024

Circuit Reserve Policy 2024/25

The reserves policy for the North Kirklees and Morley Methodist Circuit is to hold a sum equivalent to 6 months average expenditure. This will be around £230k.

This I believe is sufficient to meet any unforeseen item of major expenditure and/or be able to continue in the short-term funding planned activities in the event of an inability to raise the full circuit assessment from churches.

It will also ensure that we have funds to cover the payment of stipends and expenses for the ministers and lay workers and our contribution to the District and Connexion.

In the unlikely event of the above happening these funds can be drawn down from Circuit Model Trusts and other investments (none of the intended money is invested in property or other forms of investment)

A key element for any charity is that it does not hold excessive funds that are not earmarked for future property/ mission work.

As previously stated, the Model Trust Fund can be used by the Circuit for a variety of mission, ministry, and property projects.

The Circuit Leadership team are acting on the feedback from the Circuit Review – looking at all aspects of church life – and this will subsequently aid our forward planning and determine our future funding needs.

This could result in funding for property schemes or potential lay workers' salaries.

Considering all the above we meet the requirements of the Charity Commission Reserve Policy

Ian Wilson

North Kirklees and Morley Circuit Treasurer

30th October 2024

911.72

1000

3671.65 -206563.76

414

810

1359

500

1585

1585

2640

BALANCE IN YEAR

2051.93

BALANCE IN YEAR TO DATE

4675.62

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT MODEL TRUST FUND- TRUST 21592

EXPENDITURE

DISTRICT LEVY/CPF PAYMENT

DEDUCTED ON 1/9/2023	22427.08
LEVY ON SALE OF WHITTAKER STREET	10019.16
LEVY ON SALE OF LEYBURN ROAD	114786.36
TOTAL	147232.6

TCMP ADMIN FEE

VARIOUS DATES	1184.73
TOTAL	1184.73

CIRCUIT/PROJECT PAYMENTS

ASSESSMENTS	80000
DRIGHLINGTON GRANT	100000
TOTAL	180000

EXPENDITURE- GRAND TOTAL **328417.33**

INCOME

INTEREST	17986.98
SALE OF 7 WHITTAKER STREET	70095.8
SALE OF 16 LEYBURN ROAD	346965.91
TOTAL	435048.69

INCOME- GRAND TOTAL **435048.69**

SUMMARY

OPENING BALANCE	415694.46
INCOME	435048.69
TOTAL	850743.2
EXPENDITURE-	328417.33
BALANCE AT 31/8/24	522325.8

Accounts were approved at the North Kirklees and Morley Circuit Meeting held on 12th December 2024

Thornhill

Gildersome

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT ACCOUNTS 2023/2024

INCOME	2023/2024	2022/2023	EXPENDITURE	2023/2024	2022/2023
Assessments	293,226.03	300,259.25	Stipends, NI contributions etc.	200,195.32	189,476.72
Interest	3,917.90	1799.35	Ministers Travel --Expenses	7735.95	3823.89
Connexional Funds/ Circuit Collections	1,134.16	911.72	Ministers Telephone/Broadband Costs	9556.5	7117.32
Other Circuit Income	43,237.48	29925.43	Supernumery Preachers fee and travel	4015.5	1972.41
CRC-Net income from printing after expenses		1000	Local Preachers Expenses	659.30	300
Payment from Circuit Advance Fund	80000	35000	District Assessment	85736	83644
TOTAL	421515.57	368895.75	CRC- Administrative Staff	23978.6	24878.81
			CRC- Expenditure	10094.57	10673.3
			Manses Council Tax	15,689.90	12,224.65
			Manses Water Rates	2025.66	1905.98
			Manses Insurance	6594.43	6083.24
			Manses Maintenance/Property Upgrad	12,305.32	22606.08
			Manses Alarm- Heating Contracts	986	1050
			Church Property Costs	3415.66	7290.02
			Hanging Heaton Expenditure	22518.63	
			Other Expenditure	9438.14	14224.49
			Connexional Funds/ Circuit Collections	1134.16	961.72
			Youth Work Expenditure	1764.3	1200
			Closure Old Circuit HSBC Acct		26.88
			TOTAL	417843.92	389459.51
			INCOME 2023/2024	421515.57	368895.75
			OVERALL DEFICIT/INCREASE FOR YEAR-	3671.65	-206563.76
			CFWD FROM 2022/2023	51867.89	72431.65
			TOTAL CARRIED FORWARD TO 2024/25	55539.54	51867.89
BALANCES AT 31/08/2024					
CO-OP	36,704.27				
CFB	63,436.82				
Cash	4.9				
TOTAL	100145.99				
NEWLANDS	18891.38				
GILDERSOME	25715.07				
CIRCUIT BALANCE	55539.54				

Name of CircuitNorth Kirklees and Morley.....
No.....27/36.....

Declarations and Scrutiny

I confirm that these accruals-based accounts for the year to 31 August 2024 have been prepared from the records of the Circuit and that they include all funds under the control of the Circuit meeting.

Ian Wilson
Signature of treasurer Date..... 10/12/2024

Name and address of treasurerIan Wilson 5 Parkfield Avenue
Mirfield.....

..... Post Code...WF14
9HJ.....

Presentation to the Circuit meeting

I confirm that the annual report and accounts for the year ended 31 August 2024 were/ *
presented to the Circuit meeting held on ... 10th
December 2024.....

Rev Marian Olsen
Signature of the Chair of the meeting

Rev Marian Olsen
Name of the Chair of the meeting Date
10/12/24.....

Independent Examiner's Report to the Trustees of the

.....North Kirklees and Morley..... Circuit
1145602
Charity Number

Responsibilities and basis of report

I report to the trustees on my examination of the accounts of theNorth Kirklees and Morley..... Circuit for the year ended 31 August 2024 set out on pages ... to As the Circuit'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 Circuit's accounts carried out under section 145 of the 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.

* delete or circle as appropriate

Name of CircuitNorth Kirklees and Morley Methodist
Circuit..... No
27/36

Independent Examiner's Statement

[The Circuit's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of (*insert name of applicable listed body*)]. *Delete [] if not applicable.*

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below*) which give me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Act; or
- the accounts do not accord with the accounting records; or
- the accounts do 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 *Delete if not applicable ie all R&P accounts*
- the trustees' annual report is not consistent with the accounts *Delete if not applicable ie all R&P accounts.*

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.

I have/have not* obtained independent verification of all investments with the Trustees for Methodist Church Purposes or held in other trusts, bank balances and funds at the Central

Finance Board of the Methodist Church which are individually in excess of £10,000 (ten thousand pounds) at the balance sheet date.

Signature of independent examiner

Name of independent examiner

Relevant professional qualification of independent examiner

Name of firm (where appropriate)

Address

..... Post Code

Date

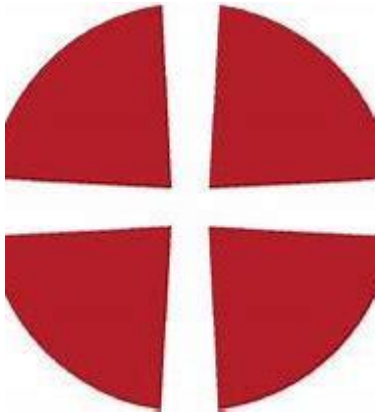
NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT

England & Wales - Charity number 1145602

Accounts

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT

Registered Charity No-1145602



REPORT AND FINANCIAL STATEMENTS FOR THE YEAR
ENDED 31 AUGUST 2023

RESERVES POLICY 2023/2024

Structure

The North Kirklees and Morley Circuit is part of the Yorkshire West District.

The Circuit functions in accordance with the Constitution, Practice and Discipline (CPD) of the Methodist Church, often referred to as the Connexion.

Names of the charity trustees

The number of trustees fluctuates during the year depending on changes in office holders in the churches and Circuit. There was an average of forty trustees listed on the Charity Commission website during this year.

They are appointed by local churches and existing trustees; Ministers are automatically trustees.

In accordance with the CPD of the Methodist Church, the Chair is Rev Marian Olsen the Superintendent Minister of the Circuit, who was appointed on 1 September 2022.

The charity governing document is the Deed of Union (1932) and Methodist Church Act (1976)

The Circuit trustees meet four times each year (the Circuit Meeting).

The Circuit Leadership Team (CLT) consisting of the Circuit Stewards, Staff and other Circuit Officers meet monthly and cover the day-to-day management of the Circuit.

Circuit Administration activities are undertaken by two members of staff who are based at Batley Central Methodist Church

These financial statements comply with the charity's governing document, which being the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice.

This is applicable to all charities who prepare their accounts in accordance with the Financial Reporting Standard applicable in the UK and Ireland published in October 2019.

Financial Review 2022/2023

The Circuit Accounts includes:

- **The General Fund** is the main operating account through which the expenditure and revenue for both operational and strategic purposes are managed. As such we have accounts with the Co-operative Bank and Central Finance Board
 - The purpose of the fund is to secure and maintain the Circuits viability and future.
 - To enable the Circuit to fulfil its Mission Policy
 - The financial affairs of both **Gildersome and Newlands** are administered through the General Fund – all transactions are recorded separately, and balance sheets included in this report.
 - The total income of the General Fund in 2022/23 was £368,895 (£373,868 in 2021/22) – Total expenditure in 2022/23 was £389,459 (£390,999 in 2021/22)
 - Net deficit in 2022/23 was £20,540 (£17,130 in 2021/22)
 - **Balance carried forward to 2023/23 is £51,890.**
 - A full balance sheet is included in this report.
-
- **Circuit Model Trust-** This fund derives from sales of Churches and other Circuit properties such as Manses. Monies are held at TMCP.
 - Following changes to Standing Orders in 2009 Circuit Model Trust Funds are now categorised as unrestricted funds and may be used for property, mission and outreach. Every year the balance in the fund incurs a levy towards the District Advance Fund. The first £100,000 is subject to a 2½ %, levy £100,000 - £250,000 is levied at 5 % and anything over £250,000 at 7.5%-In 2022/23 this came to £16,472- There is also an administration fee that TMCP impose – for 2022/23 this was £958.
 - During 2022/23 the Methodist Church at Thornhill was sold. The net proceeds from the sale £119,118 (Total sale £158,529- £39,411 levy) was paid into the trust.
 - In addition, the fund attracted total interest of £12,710.
 - In addition to the levy and administration charges, during the year the Circuit agreed to withdraw £35,000 to support significant upgrades to our manses]
 - Balance of the Circuit Model Trust as at **31/8/23 is £415, 694** (though £100,000 of this is ringfenced for Drighlington redevelopment – subsequently withdrawn in October 2023)
 - A full breakdown is included in this report.
-
- The Circuit also has several **Other Trusts** Again they are held at TMCP- These are mainly as a result of Church closures and funds moving across to the Circuit. Whilst they have their own specific ‘terms and conditions’ they are in effect model trusts and can be used for property, mission and outreach.

- They all gain interest and attract an administration charge.
- **At 31/8/2023 the total balance of these trusts was £236,284**
- Again, a full breakdown is included in this report.

- The Circuit has one **Endowment fund** -The capital sum must be retained, and we receive a very nominal amount of interest.

- **Fixed Assets** – For us these are the 7 manses – Using the valuations applied by Methodist Insurance this equates to £2,802.840 (£2.8m)

The Circuit has the following principal sources of funds:

- Assessments received from Churches within the Circuit
- Rental income from 2 Trust Properties (Morley- Leyburn Road and Old Bank Road Dewsbury)
- The Circuit Model Trust Fund / Other Trust Funds / Interest
- Printing income from Circuit Resource Centre

The Circuit is responsible for

- The Ministerial oversight and pastoral care of the 15 local churches in the circuit
- The support of a ministry team of 4 Presbyters and 1 Deacon
- Two administrative members of staff
- Payment of the Circuit contribution to the District and Connexion, of which a significant part is used to fund the work of the wider Methodist Church
- Maintenance of 7 Circuit Manses (including the two where we have a rental income)
- Upkeep and maintenance of empty Circuit Properties pending sale -Hanging Heaton (lesser extent Wesley Playhouse)
- Other miscellaneous costs

General Comments

- One of the key achievements during the year was to implement a new formula for calculating individual **Church Assessments**
- It still has its flaws – but all agreed that it was a significant step forward and represented a much fairer model. The main elements being that -
- Formula based on 50% membership and 50% on attendance.
- The figures taken from those declared at the October count.

- Some Churches saw a decrease.
 - But for some there was a significant increase. Therefore, a maximum 5% cap increase was put in place.
 - Churches could of course contribute a higher figure than calculated if finances allow.
 - The revised figures were implemented from the August 2023 payment.
- **Another policy that we implemented** – as away of supporting local churches was to agree that if they were experiencing short term cash flow issues then we would allow an assessment holiday for a maximum of 2 payment quarters.
- These easements do of course impact the 2023/24 budget – and as a minimum we are forecasting a **£80,000 shortfall** – Circuit Meeting has previously agreed that we should withdraw from Circuit Model Trust to plug this gap.
- It has already been agreed that in 2024/25 we will not be entering into stationing. You will already be aware of the plans that are been put in place to support the Circuit working with four presbyters next year. Further work has been undertaken to look at other options going forward.
- Unfortunately, a reduction in staffing will not see a reduction in the overall amount (including assessments) that we need to raise for the 24/25 budget – like us all the church is not immune from general cost of living increases – including stipends and other salary costs.
- We are fortunate to have monies in Model Trusts that we can draw upon – and the likelihood is that this will only increase in the next 12 months with the sale of Hanging Heaton and potentially other circuit properties.
 - Even accounting for the £100k which has now been paid to Drighlington and the £80k to cover the budget shortfall (and thus not reflected in the 31/8/23 year-end figures) – we still have around £470k in these trusts.

Ian Wilson

North Kirklees and Morley Circuit Treasurer

27TH h November 2023

Circuit Reserve Policy 2023/24

The reserves policy for the North Kirklees and Morley Methodist Circuit is to hold a sum equivalent to 6 months average expenditure. This will be around £230k.

This I believe is sufficient to meet any unforeseen item of major expenditure and/or be able to continue in the short-term funding planned activities in the event of an inability to raise the full circuit assessment from churches.

It will also ensure that we have funds to cover the payment of stipends and expenses for the ministers and lay workers and our contribution to the District and Connexion.

In the unlikely event of the above happening these funds can be drawn down from Circuit Model Trusts and other investments (none of the intended money is invested in property or other forms of investment)

A key element for any charity is that it does not hold excessive funds that are not earmarked for future property/ mission work.

As previously stated, the Model Trust Fund can be used by the Circuit for a variety of mission, ministry, and property projects.

The on- going Circuit Review – looking at all aspects of church life – will subsequently aid our forward planning and determine our future funding needs.

This could result in funding for property schemes or potential lay workers' salaries.

Considering all the above we meet the requirements of the Charity Commission Reserve Policy

Ian Wilson

North Kirklees and Morley Circuit Treasurer

27th November 2023

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT ACCOUNTS 2022/2023

INCOME	2022/2023	2021/2022	EXPENDITURE	2022/2023	2021/2022
Assessments	300,259.25	335,948.50	Stipends, NI contributions etc.	189,476.72	182,006.17
Interest	1799.35	289.5	Ministers Travel --Expenses	3823.89	3727.48
Connexional Funds/ Circuit Collections	911.72	1662.95	Ministers Telephone/Broadband Costs	7117.32	5216.33
Other Circuit Income	29925.43	34967.82	Supernumery Preachers fee and travel	1972.41	2660.5
CRC-Net income from printing after expenses	1000	1000	Local Preachers Expenses	300	400
Payment from Circuit Advance Fund	35000		District Assessment	83644	86680
TOTAL	368895.75	373868.77	CRC- Administrative Staff	24878.81	21802.32
			CRC- Expenditure	10673.3	10330.73
			Manses Council Tax	12,224.65	14,684.71
			Manses Water Rates	1905.98	1955.74
			Manses Insurance	6083.24	5233.18
			Manses Maintenance/Property Upgrade	22606.08	27437.92
BALANCES AT 31/08/2023			Manses Alarm- Heating Contracts	1050	945
CO-OP	47,839.16		Church Property Costs	7290.02	6099.52
CFB	41,914.72				
Cash	-7.09				

TOTAL	89746.79
NEWLANDS	14215.76
GILDERSOME	23663.14
CIRCUIT BALANCE	51867.89

Loan to Church		3133.2
Ministers Removal Costs/Grant		3575.06
Other Expenditure	14224.49	7093.78
Connexional Funds/ Circuit Collections	961.72	1662.95
Rev Alex Kersla Appeal		4978
Youth Work Expenditure	1200	1377.04
Closure Old Circuit HSBC Acct	26.88	
TOTAL	389459.51	390999.63
INCOME 2022/2023	368895.75	373868.77
		-
OVERALL DEFICIT FOR YEAR-(23.10 ADJ)	206563.76	-17130.86
CFWD FROM 2020/2021	72431.65	89562.51
TOTAL CARRIED FORWARD TO 2023/2024	51867.89	72431.65

GILDERSOME -GREENSIDE - FUNDS MANAGED THROUGH CIRCUIT ACCOUNT -SEPTEMBER 2022-AUGUST 2023

INCOME	2022-2023	EXPENDITURE	2022-2023
Lettings	5214	Methodist Insurance	773.18
Grants	3035.87	Eaton Smith & Downey	1800
TOTAL	8249.87	Closing Service Expenses	382.08
		Boiler and Appliance Gas Service	480
		Flamstop-Fire Extinguisher	153
		Yorkshire Water	121.39
		Pozitive Energy- Gas	2552.96
		Roof Repairs	2850
		EON-Electric	1993.29
		Misc Exp-Includes Cleaner	932.67
		TOTAL	12038.57
		INCOME	8249.87
		BALANCE IN YEAR TO DATE	-3788.7

CHURCH BALANCE ON CLOSURE 27451.84

BALANCE AS AT 31/08/2023 23663.14

NEWLANDS - FUNDS MANAGED THROUGH CIRCUIT ACCOUNT -SEPTEMBER 2022-AUGUST 2023

INCOME	2022-2023	EXPENDITURE	2022-2023
Lettings	11642	Cleaner	2603.52
TOTAL	11642	Harvest and Easter Expenses	142.68
		Tree Surgery	564
		Waste Collection	110.4
		Chubb-	124.56
		New Lock	150
		Misc Exp-	72.15
		TOTAL	3767.31
		INCOME	11642
		BALANCE IN YEAR TO DATE	7874.69
		BALANCE CFWD 21/22	6341.07
		BALANCE AS AT 31/08/2023	14215.76

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT MODEL TRUST FUND- TRUST 21592

2023

EXPENDITURE

DISTRICT LEVY/CPF PAYMENT

DEDUCTED ON 1/9/2022	16472.3
LEVY ON SALE OF THORNHILL	39411.6
TOTAL	55883.9

TCMP ADMIN FEE

VARIOUS DATES	958.45
TOTAL	958.45

WITHDRAWEL TO SUPPORT MANSE UPGRADES	35000
EXPENFITURE- GRAND TOTAL	91842.35

INCOME

INTEREST	12710.43
SALE OF THORNHILL	158529
INCOME- GRAND TOTAL	171239.43

SUMMARY

OPENING BALANCE	336297.38
INCOME	171239.43
TOTAL	507536.81

EXPENDITURE-	91842.35
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BALANCE AT 31/8/23	415694.46
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OTHER CIRCUIT TRUSTS**CLOSING BALANCES AS AT 31/8/2023**

TRUST FUND NUMBER	20584	16271	11878	12487	18393	19984 Thornhill	12861	14305 Gildersome	4040	TOTAL
		*	*							
INTEREST/INCOME	1581.84	669.58	42.98	15.62	11.01	2266.1	37.51	2534.67	93.2	7252.51
ADMIN	140.45	669.58	44.44	1.39	0.98	201.2	3.33	225.05	20.05	1306.47
PAYMENTS MADE	0	0	0	0	0	0		0	0	0
TOTAL MOVEMENT	1441.39	0	-1.46	14.23	10.03	2064.9	34.18	2309.62	73.15	5946.04
OPENING BALANCE	49280.1	21106.28	1356.46	486.25	343.12	70597.44	1168.45	78964.14	7036.19	230338.43
CLOSING BALANCE	50721.49	21106.28	1355	500.48	353.15	72662.34	1202.63	81273.76	7109.34	236284.47

Fixed Assets- Manse Vaiuations-Occupied-Taken from Methodist Insurance property valuation -2022/2023

12 Stockwell Drive Batley	503,476
Lee Green Mirfield	401,928
6 Shaw Street Cleckheaton	412,397
579 Bradford Road Cleckheaton	365,082
4 Longwood Road Tingley	352,557
TOTAL	2,035,440

Fixed Assets- Manse Valuation- Currently gaining rental income-Taken from Methodist Insurance property valuation

146 Old Bank Road Mirfield	323,046
29 Bluebell Gardens Morley	444,354
TOTAL	767,400

Accounts approved at Circuit Meeting held Thursday 14th December 2023

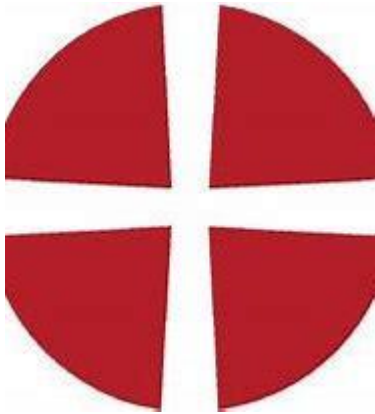
NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT

England & Wales - Charity number 1145602

Accounts

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT

Registered Charity No-1145602



REPORT AND FINANCIAL STATEMENTS FOR THE YEAR
ENDED 31 AUGUST 2022

RESERVES POLICY 2022/2023

Structure

The North Kirklees and Morley Circuit is part of the Yorkshire West District, and is accountable to the Methodist Circuit

The Circuit functions in accordance with the Constitution, Practice and Discipline (CPD) of the Methodist Church, often referred to as the Connexion.

Names of the charity trustees

The number of trustees fluctuates during the year depending on changes in office holders in the churches and Circuit. There was an average of forty trustees listed on the Charity Commission website during this year.

They are appointed by local churches and existing trustees; Ministers are automatically trustees.

In accordance with the CPD of the Methodist Church, the Chair is Rev Marian Olsen the Superintendent Minister of the Circuit, who was appointed on 1 September 2022.

The charity governing document is the Deed of Union (1932) and Methodist Church Act (1976)

The Circuit trustees meet four times each year (the Circuit Meeting).

The Circuit Leadership Team (CLT) consisting of the Circuit Stewards, Staff and other Circuit Officers meet monthly and cover the day-to-day management of the Circuit

Circuit Administration activities are undertaken by two members of staff who are based at Batley Central Methodist Church

These financial statements comply with the charity's governing document, which being the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice.

This is applicable to all charities who prepare their accounts in accordance with the Financial Reporting Standard applicable in the UK and Ireland published in October 2019.

Financial Review 2021/22

The Circuit Account includes:

- The General Fund is the main operating account through which the expenditure and revenue for both operational and strategic purposes are managed. As such we have accounts with the Co-operative Bank and Central Finance Board
- The Circuit Model Trust Fund which primarily arises from the sale of buildings no longer required within the Circuit. Under Conference directions the Fund can be used for any purpose supporting the mission of the Church. Applications must be made to the Circuit Meeting
- The various restricted funds which are detailed within the notes to the accounts.
- The endowment fund holds money which cannot be spent but must be retained (as capital) to generate an income (we receive nominal interest)

The Circuit has the following principal sources of funds:

- Assessments on Churches within the Circuit
- Rental income from 2 Trust Properties (Morley and Old Bank Road Dewsbury)
- Interest on investments
- The Circuit Model Trust Fund

These sums are used to administer, facilitate the work of the Circuit, and secure its future viability and future work

As such the monies currently provide for

- 4 Presbyters and 1 Deacon who provide ministerial oversight and pastoral care of the churches in the Circuit
- Two members of staff at the Resource Centre
- Maintenance of 7 Circuit Manses (including the two where we have a rental income
- Upkeep and maintenance of empty Circuit Properties – where the future direction is still to be agreed (Gildersome- and to a lesser extent Newlands and Wesley Playhouse
- District / Connexional Assessment (currently
- Miscellaneous travel costs / preaching fees etc

The Covid-19 pandemic and measures taken to control the spread of the virus continue to impact the income streams across the Circuit

Church incomes continue to be restricted by reduced income from both lettings from external user groups and numbers attending weekly worship, which in turn has led to difficulty for some in paying their assessed contribution to the Circuit.

However, over 90% of the planned assessment was received during the year, but I fully appreciate that for some this was a struggle to meet their commitment and have concerns going forward

As such the recently formed Circuit Finance Group are re-visiting the formula as to how we collect individual assessments (at present it is based on ability to pay agreed by the church treasurers- and NOT on membership). This is no easy task – and we are working our way through a number of options – and hope to bring a proposal to the March 2023 Circuit Meeting to implement from September 2023

I will stress that in the interim if a Church has a specific concern, they speak to myself direct

The respective accounts for 2021/22 are documented at the end of this report for you to consider

Happy to answer any questions either in advance or on the night – but just to draw your attention to a couple of areas

- Presbyters (including Deacon) stipend rate is agreed each year by Methodist Conference. Any increase is based on the average of the increases in the consumer price index and the average weekly earnings index
- As such it is agreed Circuit Policy that any increase that is paid to Presbyters will be applied to our Lay Workers
- District/ Connexional Assessment – this supports the work of the district – including admin staff – and Connexional colleagues who implement wider strategic, resourcing and mission work- The calculation of each Circuit contribution is complex – but an element is based on ability to pay – and we do come out of these discussions very favourably
- We have heavily invested this year in our manse maintenance – The pandemic naturally put on hold some of this planned work – so it has been very much a case of playing catch up
- Going forward it is our intention to take a more planned strategic view in respect manse maintenance – working closely with Alan Curry – who does a brilliant job for us in this area- keeping costs to a minimum – and ensuring we get value for money
- Rental income -Morley Manse £1000 pcm -Old Bank Road £775 pcm
- Since the year -end Thornhill has been sold (£143k) and these proceeds will be paid into the Circuit Model Trust –

Summary of Total Funds Held

General Fund £72,431.65

Circuit Model Trust (held at TMCP) £336,297.38 (Does not include proceeds from sale of Thornhill)

Other Circuit Trusts (held at TMCP) £151,374.29

Fixed Assets

Total value of 7 manses (5 occupied – 2 rental) £2,580,860

The accounts are currently with the auditor- Thus subject to them finding no areas to bring to your attention I am asking for your approval of the accounts subject to this caveat

Ian Wilson

North Kirklees and Morley Circuit Treasurer

24th November 2022

The Accounts were subsequently approved at the Circuit Meeting held on the 8th December 2022

No issues identified

Circuit Reserve Policy

The reserves policy for the North Kirklees and Morley Methodist Circuit is to hold a sum equivalent to 6 months average expenditure. This will be around £230k

This I believe is sufficient to meet any unforeseen item of major expenditure and/or be able to continue in the short-term funding planned activities in the event of an inability to raise the full circuit assessment from churches.

It will also ensure that we have funds to cover the payment of stipends and expenses for the ministers and lay workers and our contribution to the District and Connexion.

In the unlikely event of the above happening these funds can be drawn down from Circuit Model Trusts and other investments (none of the intended money is invested in property or other forms of investment)

A key element for any charity is that it does not hold excessive funds that are not earmarked for future property/ mission work

As previously stated, the Model Trust Fund can be used by the Circuit for a variety of mission, ministry, and property projects.

There is an on-going Circuit Review – looking at all aspects of church life – which will subsequently aid our forward planning and determine our future funding needs.

This could result in funding for property schemes or potential lay workers' salaries

Considering all the above we meet the requirements of the Charity Commission Reserve Policy

Ian Wilson

North Kirklees and Morley Circuit Treasurer

24th November 2022

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT ACCOUNTS 2021/2022

INCOME	2021/2022	2020/2021	EXPENDITURE	2021/2022	2020/2021
Assessments	335,948.50	348,015.50	Stipends, NI contributions etc.	182,006.17	216,900.24
Interest	289.5	69.99	Ministers Travel --Expenses	3727.48	6211.79
Connexional Funds/ Circuit Collections	1662.95	1209.61	Ministers Telephone/Broadband Costs	5216.33	5338.56
Other Circuit Income	34967.82	40185.61	Supernumery Preachers fee and travel	2660.5	359
CRC-Net income from printing after expenses	1000	0	Local Preachers Expenses	400	100
Payment from Circuit Advance Fund		60000	District Assessment	86680	91432
TOTAL	373868.77	449480.71	CRC- Administrative Staff	21802.32	22142.59
			CRC- Expenditure	10330.73	4811.47
			Manses Council Tax	14,684.71	11,834.48
			Manses Water Rates	1955.74	1825.2
			Manses Insurance	5233.18	4736.83
			Maintenance/Property		
			Manses Upgrade	27437.92	26345.56
			Manses Alarm- Heating Contracts	945	1729
			Church Property Costs	6099.52	2268.71
			Loan to Church	3133.2	6000
			Ministers Removal Costs/Grant	3575.06	1189.54
			Other Expenditure	7093.78	23400.32
			Connexional Funds/ Circuit Collections	1662.95	1209.61
			Rev Alex Kerala Appeal	4978	
			Youth Work Expenditure	1377.04	
			TOTAL	390999.63	427834.9
			INCOME 2021/2022	373868.77	449480.71
			OVERALL SURPLUS FOR YEAR	-17130.86	21645.81
			CFWD FROM 2020/2021	89562.51	67916.7
			TOTAL CARRIED FORWARD TO		
			2022/2023	72431.65	89562.51
BALANCES AT 31/08/2022					
CO-OP	4,332.47				
CFB	74,253.82				
HSBC	26.6				
HSBC	0.28				
Cash	159.55				
TOTAL	78772.72				
NEWLANDS	6341.07				
CIRCUIT BALANCE	72431.65				

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT MODEL TRUST FUND- TRUST 21592

2022

DISTRICT LEVY/CPF PAYMENT

DEDUCTED ON 1/9/2021 17761.65
TOTAL 17761.65

TCMP ADMIN FEE

DEDUCTED FROM 1/9/2021 1007.44
TOTAL 1007.44

GRAND TOTAL 18769.09

INCOME

INTEREST 1577.83
TOTAL 1577.83

SUMMARY

OPENING BALANCE 353488.64
INCOME 1577.83
TOTAL 355066.47

EXPENDITURE- 18769.09

BALANCE AT 31/8/22 336297.38

OTHER CIRCUIT TRUSTS

CLOSING BALANCES AS AT 31/8/2022

TRUST FUND NUMBER	RESTRICTED	20584	16271	11878	12487	18393	19984	12861	4040	GRAND TOTAL
			RESTRICTED *	RESTRICTED *	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	ENDOW	
INTEREST/INCOME		230.85	99.05	6.35	2.29	1.6	330.73	5.49	-103.15	573.21
ADMIN		140.19	101.92	5.07	1.38	0.98	200.83	3.32	20.41	474.1
PAYMENTS MADE		0	0	0	0	0	0		0	0
TOTAL MOVEMENT		90.66	-2.87	1.28	0.91	0.62	129.9	2.17	-123.56	99.11
OPENING BALANCE		49189.44	21109.15	1355.18	485.34	342.5	70467.54	1166.28	7159.75	151275.18
CLOSING BALANCE		49280.1	21106.28	1356.46	486.25	343.12	70597.44	1168.45	7036.19	151374.29

* Trustee income from trusts 16271 and 11878 is paid direct into Circuit Current Account

Fixed Assets- Manse Vaiuations-Occupied-Taken from Methodist Insurance property valuation -2021/22

12 Stockwell Drive Batley	463,601
Lee Green Mirfield	370,096
6 Shaw Street Cleckheaton	379,736
579 Bradford Road Cleckheaton	336,169
4 Longwood Road Tingley	324,635
TOTAL	1,874,237

Fixed Assets- Manse Valuation- Currently gaining rental income-Taken from Methodist Insurance property valuation

146 Old Bank Road Mirfield	297,461
29 Bluebell Gardens Morley	409,162
TOTAL	706,623

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT MODEL TRUST FUND- TRUST 21592

DISTRICT LEVY/CPF PAYMENT

DEDUCTED ON 1/9/2021 17761.65
TOTAL 17761.65

TCMP ADMIN FEE

DEDUCTED FROM 1/9/2021 1007.44
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GRAND TOTAL 18769.09

INCOME

INTEREST 1577.83
TOTAL 1577.83

SUMMARY

OPENING BALANCE 353488.64
INCOME 1577.83
TOTAL 355066.47

EXPENDITURE- 18769.09

BALANCE AT 31/8/22 336297.38

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT

England & Wales - Charity number 1145602

Accounts

Trustee Report 2021

The Circuit Funds essentially provide for

- The ministerial oversight, pastoral care of the 17 active local churches
- The support of a ministry team of five presbyters and a deacon
- The maintenance of seven Circuit manses and two churches where we have ceased to meet
- The resources for 2 lay employees and running costs of the Circuit Resources Centre
- District Assessment
- Assistance to the churches in the Circuit to help develop their property for mission
- Expenses in relation to Local Preaching and the life of the Circuit in worship, mission and cate

The Circuit Budget is reviewed annually ideally in conjunction with the Church Treasurers- the pandemic and subsequent uncertainty prevented this happening last year. The budget covers the costs of the above and the assessment for each church is agreed in consultation with the church treasurers

Like all walks of life, the last 12 months have been challenging for the Methodist Church at all levels- be that Connexionally, District and Circuit

Prior to the pandemic we had several churches that were struggling due to decreasing active members which naturally links to financial pressures- Unfortunately in the last 12 months we have had one church that has ceased to worship

As a circuit we have a policy of supporting the local churches- and at the start of the pandemic we issued an assurance to the treasurers that if they were struggling due to the loss of income then we would help- As such we agreed an assessment holiday for one church and a reduced amount for a couple of the others

In addition, we have supported another with an interest free loan to cover some unexpected expenditure.

We also have been supporting the running costs of 2 redundant properties – again delay in either the sale or possibilities for future use has been delayed due to the pandemic.

Of course – going forward the financial impact because of the pandemic is still unknown – As a circuit we initially agreed not to fill one of our ministerial vacancies for 12 months from September 2021- This has now increased to a second vacancy due to another colleague been successful in being stationed to a critical post in another District.

We are at the start of undertaking a full review of the mission and structure of the Circuit. The result of this review will naturally impact our financial thinking.

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT ACCOUNTS 2020/2021

INCOME	2020/2021	2019/2020	EXPENDITURE	2020/2021	2019/2020
Assessments	348,015.50	349,147.10	Stipends, NI contributions etc.	216,900.24	208602.77
Interest	69.99	402.27	Ministers Travel --Expenses	6211.79	8730.15
Connexional Funds/ Circuit Collections	1209.61	5498.75	Ministers Telephone/Broadband Costs	5338.56	5830.04
Other Circuit Income	40185.61	25283.31	Supernumery Preachers fee and travel	359	2478.94
CRC-Net income from printing after expenses	0	2000	Local Preachers Expenses	100	546.1
Payment from Circuit Advance Fund	60000	52000	District Assessment	91432	95244
Spen Valley Youth Project		11256.69	CRC- Administrative Staff	22142.59	18412.21
TOTAL	449480.71	445588.12	CRC- Expenditure	4811.47	7661.83
			Manses Council Tax	11,834.48	13190.83
			Manses Water Rates	1825.2	2490.79
			Manses Insurance	4736.83	5109.85
BALANCES AT 31/08/2021			Manses Maintenance	26345.56	21754.16
CO-OP	21,846.50		Manses Alarm- Heating Contracts	1729	1355.55
CFB	88,530.00		Church Property Costs	2268.71	6041.62
HSBC	26.6		Loan to Church	6000	29000
HSBC	0.28		Ministers Removal Costs/Grant	1189.54	3301.84
Cash	16.68		Other Expenditure	23400.32	23461.25
TOTAL	110420.06		Connexional Funds/ Circuit Collections	1209.61	5498.75
			Youth Work Expenditure		1720.2
ST ANDREWS MIRFIELD	19215.09		TOTAL	427834.9	460430.88
NEWLANDS	1642.46		INCOME 2020/2021	449480.71	445588.12
			OVERALL SURPLUS FOR YEAR	21645.81	-14842.76
			CFWD FROM 2019/2020	67916.7	82759.46
CIRCUIT BALANCE	89562.51		TOTAL CARRIED FORWARD TO 2021/2022	89562.51	67916.7

* delete or circle as appropriate

Name of Circuit North Kirklees and Morley Methodist

No

27/36

Independent Examiner's Statement

[The Circuit's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of (insert name of applicable listed body)]. ~~Delete~~ [] if not applicable. *the ICAEW*

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (~~other than that disclosed below~~) which give me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Act; or
- the accounts do not accord with the accounting records; or
- the accounts do 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 *Delete if not applicable ie all R&P accounts*
- the trustees' annual report is not consistent with the accounts *Delete if not applicable ie all R&P accounts*

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.

I have ~~not~~ obtained independent verification of all investments with the Trustees for Methodist Church Purposes or held in other trusts, bank balances and funds at the Central Finance Board of the Methodist Church which are individually in excess of £10,000 (ten thousand pounds) at the balance sheet date.

Signature of independent examiner

Name of independent examiner

MARK ANDREW GISSON

Relevant professional qualification of independent examiner

ICAEW

Name of firm (where appropriate)

Address

37 DUNSBATLE WAY MICKFIELD

Post Code

WF14 5JG

Date

11 SEPTEMBER 2022

NORTH KIRKLEES AND MORLEY METHODIST CIRCUIT

England & Wales - Charity number 1145602

Accounts

Declarations and Scrutiny

I confirm that these accruals-based accounts for the year to 31 August 2021 have been prepared from the records of the Circuit and that they include all funds under the control of the Circuit meeting.

Signature of treasurer *ian wilk* Date *10/12/20*

Name and address of treasurer *ian wilson - 5 Parkfold Ave*

Post Code *WF14 9R* *mirfold* *9HJ*

Presentation to the Circuit meeting

I confirm that the annual report and accounts for the year ended 31 August 2021 were/will be* presented to the Circuit meeting held on *12/12/21*

Signature of the Chair of the meeting

Name of the Chair of the meeting *Dr Nigel Rodgers* Date *12/12/21*

Independent Examiner's Report to the Trustees of the

norm wilkes and morley Circuit
Charity Number *1145602*

Responsibilities and basis of report

I report to the trustees on my examination of the accounts of the *norm wilkes and morley* Circuit for the year ended 31 August 2021 set out on pages ... to As the Circuit'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 Circuit's accounts carried out under section 145 of the 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.

* delete or circle as appropriate

Name of Circuit NORTH KIRKLEES & MALDEN No 27/36

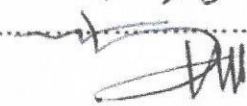
Independent Examiner's Statement

[The Circuit's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of (insert name of applicable listed body)]. ~~Delete [] if not applicable.~~ (THE INSTITUTE OF CHARTERED ACCOUNTANTS OF GREAT BRITAIN & IRELAND) I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below) which give me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Act; or
- the accounts do not accord with the accounting records; or
- the accounts do 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 *Delete if not applicable ie all R&P accounts*
- the trustees' annual report is not consistent with the accounts *Delete if not applicable ie all R&P accounts*

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.

I have ~~have not~~ obtained independent verification of all investments with the Trustees for Methodist Church Purposes or held in other trusts, bank balances and funds at the Central Finance Board of the Methodist Church which are individually in excess of £10,000 (ten thousand pounds) at the balance sheet date.

Signature of independent examiner 

Name of independent examiner MARK A GIBSON

Relevant professional qualification of independent examiner ICAEW

Name of firm (where appropriate) N/A

Address 37 DUNBOTTLE WAY, MICFIELD

Post Code W114 9JL

Date 4 June 2021

* delete or circle as appropriate

September 2020