

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				

CRC Expenses					14666.54
District Assessment					86000
Other Expenditure					
Quinquennials					18752.86
Connexional Funds/ Circuit Collections					1171.10
Gildersome Expenditure					11709.2
Newlands Expenditure					8280.73
Miscellaneous					19051.46
TOTAL					58965.35
Manse Valuations					
Occupied					
12 Stockwell Drive Batley					674078
Lee Green Mirfield	Tenant	Sept 25			538120
6 Shaw Street Cleckheaton					552136
579 Bradford Road Cleckheaton					488790
4 Longwood Road Tingley					472020
TOTAL					2725144
Manse Valuations					
Un-Occupied					
146 Old Bank Road Dewsbury					432513
TOTAL					432513

Balances as at 31/8/2025

Cooperative Bank	£24,392.89
-------------------------	-------------------

CFB **£49,089.43**

Circuit Model Trust (TMCP) £191,392.89

Other Model Trust (TMCP) £257,304.03

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
-------------	--------------	---------	---------

NOTE 8 Office Costs

CRC Expenses	14666.54	10094.57
--------------	----------	----------

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