

PCC OF THE ECCLESIASTICAL PARISH OF APPLEBY WITH MURTON

England & Wales · Charity number 1146682

Details

Other names PCC OF APPLEBY

Status Registered

Legal form Previously excepted

Registered 2012-03-29

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

Contact

Address Drybeck Hall
Drybeck
Appleby-In-Westmorland
CA16 6TF

Phone 01768351487

Activities

Objects: PROMOTING IN THE ECCLESIASTICAL PARISH THE WHOLE MISSION OF THE CHURCH.

Activities: Parishonal activities

Classification

- **How:** Provides Buildings/facilities/open Space, Other Charitable Activities
- **What:** Religious Activities, Other Charitable Purposes
- **Who:** Elderly/old People, The General Public/mankind

Geography

- Cumbria

Finances

Period end	Income	Expenditure	Assets	Employees
2025-12-31	£73,015	£116,224	-	-
2024-12-31	£66,146	£79,230	-	-
2023-12-31	£125,554	£61,078	-	-
2022-12-31	£58,294	£81,804	-	-
2021-12-31	£74,968	£100,768	-	-

Trustees

Name	Role	Appointed
Andrew Brittlebank Dr.		2022-03-15
GEOFF GORDON		2012-01-24
JEAN HUTCHISON		2012-01-24
JO AYRES		2012-01-24
JOHN TILLOTSON		2012-01-24
LORD ANTHONY HOTHFIELD		2012-01-24
ROSEMARY MANDALE		2012-01-24
Rev Andrew Burrell		2023-05-23
Rev ROGER COLLINSON		2012-01-24
Stephen Trevelyan		2020-10-25
Susan Mc Guinness		2022-03-15
VIVIEN MARY McKAY		2017-03-28

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Accounts

CHURCH FINANCES 2025

Accounts for 2025 show a deficit of £8,535 in the income and payments account. This includes £49,355 of repairs and refurbishment financed by VAT reclaim of £10,373 and drawdown of reserves by £40,000. This repair figure includes a deduction of £19,800 from grants and donations kindly given.

The deficit is partly because of our gas supplier catching up with their billing from 2024, and also general increase in costs and Parish Offer.

The available reserves are now down to about £55, 000.

Bongate rent was £750 a month until September when our tenant moved out. The balance was restored to £7,309 by the year end, and although minor repairs are required, we expect to relet fairly soon.

There has been no reordering and the fund has a slightly increased balance of £6,067.

Lord Hothfield

Appleby PCC Income and Expenditure 2025

Year 2024	INCOME	Year 2025	Year 2024	EXPENDITURE	Year 2025	
	Voluntary giving			Ministry		
£27,531.76	Net Covenants	£25,754.63	£2,400.00	Vicar's & N.S.M.'s Exp	£3,471.90	
£6,553.19	Tax Recovered	£5,378.26				
	Loose Collections	incl		Church services		
		<hr/>	£31,132.89	£3,945.77	General	£7,162.16
£4,825.40	Collections	£2,294.19		£1,500.00	Organist	
-£4,825.40	Less paid to charities	<u>-£2,294.19</u>	£0.00	£0.00	Cleaning	£0.00
£4,508.72	Fundraising/gifts		£4,234.89	£2,983.49	Heating, lighting	£10,387.85
£2,309.80	Collecting boxes		£2,832.58		Church Buildings	
£1,597.51	PAYA		£1,989.77	£24,508.93	Repairs/refurb	£49,355.36
				£5,643.80	Insurance	£5,709.09
	Other Income				Other Expenditure	
£380.02	Accumulated Interest	£337.83		£989.42	Copy	£955.86
£2,812.66	Parochial Fees	£5,281.16			Newsletter	
£2,808.84	Dividends/Interest	£2,275.89		£668.02	Oakbeck ins	£687.15
£750.00	Healthy healing	£0.00		£107.75	Bank charges	£80.56
£46.51	Copy	£463.29				
£10.00	Newsletter	£2.00			Diosese	
£6,399.96	Oakbeck	<u>£6,399.96</u>	£14,760.13	£35,000.00	Parish offer	£36,050.00
	Reserves		£40,000.00			
	Vat refund		£10,373.88			
				£77,747.18		£113,859.93
				<u>-£22,038.21</u>	deficit	<u>-£8,535.79</u>
<u>£55,708.97</u>			<u>£105,324.14</u>	<u>£55,708.97</u>		<u>£105,324.14</u>

Hon Treas.

Lord Hothfield

Auditor

T.Taylor

Independent Examiner's Report To the PCC of Appleby with Murton

I report on the accounts for the year to 31st Dec 2025 which are set out in the Annual Report and Financial Statements.

Respective responsibilities of the Trustees and Independent Examiner.

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

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

Basis of Independent Examiner's Statement

My examination was carried out in accordance with the General Directions given by the Charity Commission.

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 seeking explanations from the management committee concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in a full audit and consequently I do not express an audit opinion on the accounts.

Independent Examiner's Statement

In connection with my examination, no matters have come to my attention:

1. which give me reasonable cause to believe that in any material respect the requirements

(a) to keep accounting records in accordance with s.130 of the 2011 Act;
and

(b) to prepare accounts which accord with these accounting records
have not been met; or

2. To which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Trevor Taylor
Redlands Bank farm
Bolton
Appleby-in-Westmorland
CA16 6AH

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Accounts

CHURCH FINANCE 2024

Accounts for 2024 show a deficit of £22,038 in the income/ and payments account. This includes £24,508 of repairs and an increase of £5,000 to our Parish offer.

Although our income was pleasingly increased by £5,000, our Heating/lighting bill will be very much higher next year when the delays to billing are resolved.

The available reserves are now down to about £100,000.

Bongate rent is now £750 a month which has restored its balance to £2,553.

There has been no reordering and the fund has a slightly increased balance of £5,948.

Lord Hothfield

St. Michael's (Bongate) Institute 2024

Year 2023	RECEIPTS	Year 2024	Year 2023	EXPENDITURE	Year 2024
£2,515.16	Treas. Balance	-£4,751.51	£513.67	Insurance	£525.68
£4,320.00	Rent	£8,790.00			
£495.00	PFK		£10,618.16	PFK	£643.98
£127.14	Council tax refund		£1,076.98		£315.28
			-£4,751.51	Treas. Acc Balance	£2,553.55
<u>£7,457.30</u>		<u>£4,038.49</u>	<u>£7,457.30</u>		<u>£4,038.49</u>

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CHURCH FINANCE 2023

Accounts for 2023 show a surplus of £4,869 in the receipts and payments account. This is mainly due to the Ministry offer being reduced by £7,000 and another repayment of service charges from our suppliers.

Our voluntary giving was pleasingly a little up on last year.

The unrestricted reserves are increased to £126,800 thanks to generous legacies from Jean Ashmead and Vida Scott.

Bongate has been refurbished at a cost of £11,700 giving a deficit of £4,751, but is now let at a rent of £720 per month.

The reordering has a balance of £5,744 having purchased chairs for £2,024.

Lord Hothfield

St. Michael's (Bongate) Institute 2023

Year 2022	RECEIPTS		Year 2023		Year 2022	EXPENDITURE	Year 2023
£1,686.78	Treas. Balance	<u>£2,515.16</u>	£2,515.16		£495.99	Insurance	£513.67
£3,120.00	Rent	£4,320.00					
	PFK	£495.00			£1,795.63	Repair	£10,618.16
	Council tax refund	<u>£127.14</u>	£4,942.14			Council Tax	£1,076.98
					<u>£2,515.16</u>	Treas. Acc Balance	<u>-£4,751.51</u>
<u>£4,806.78</u>			<u>£7,457.30</u>		<u>£4,806.78</u>		

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CHURCH FINANCE 2022

Accounts for 2022 show a deficit of £5,975 in the receipts and payments account even though the Parish offer was reduced by £5,000.

Our voluntary giving was down by about £3,000 which with an ageing congregation is a worrying trend in a year when Covid was not such a factor.

The charges for heating and lighting were low due to a cancellation of bills by the suppliers at Murton and Appleby. But next year the gas charge for Appleby is likely to be about £15,000 higher. There is also a leak to the vestry roof needing repair.

The reserves are £46,385.

Bongate has been empty for some months pending reletting.

The reordering benefited by the closing of the Hodson fund (£8,131) and still has a balance of £7,682.

Lord Hothfield

St. Michael's (Bongate) Institute 2022

Year 2021	RECEIPTS		Year 2022		Year 2021	EXPENDITURE	Year 2022
	Deposit Balance						
£2,190.09	Treas. Balance	<u>£1,686.78</u>	£1,686.78		£436.83	Insurance	£495.99
£6,240.00	Rent		£3,120.00				
					£5,306.48	Repair	£1,795.63
					£1,000.00	G. Gordon	
					£1,686.78	Treas. Acc Balance	<u>£2,515.16</u>
<u>£8,430.09</u>			<u>£4,806.78</u>		<u>£8,430.09</u>		<u>£4,806.78</u>

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CHURCH FINANCES 2021

Yet another Covid year though there are signs of abatement.

Accounts for 2021 show a deficit of £11,066 in the receipts and payments account, making the two year deficit £25,000. This has been possible by reducing our reserves, now down to £49,000.

Compared with the last pre-covid year of 2019, freewill offerings and tax rebate are down by nearly £8,000 and unless this can recover, our free will offer, reduced by £5,000 for 2022, will have to be reduced again in 2023.

Notable increased costs this year are general services (quinquennial costs and pump, electrical and boiler maintenance), and heating and lighting.

Bongate account paid for repairs to Oakbeck (£5,306).

Renewal resumed thanks to a generous £13,566 gift from the Norben Trust and £30,000 from our legacy fund. There was also a refund of VAT. There is still £16,584 for further work in hand.

Lord Hothfield

St. Michael's (Bongate) Institute 2021

Year 2020	RECEIPTS		Year 2021		Year 2020	EXPENDITURE	Year 2021
	Deposit Balance						
£16,865.87	Treas. Balance	<u>£2,190.09</u>	£2,190.09			Insurance	£436.83
£6,215.00	Rent		£6,240.00		£10,000.00	PCC loan	
					£10,890.78	Repair	£5,306.48
						G. Gordon	£1,000.00
					£2,190.09	Treas. Acc Balance	<u>£1,686.78</u>
<u>£23,080.87</u>			<u>£8,430.09</u>		<u>£23,080.87</u>		<u>£8,430.09</u>

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