



**CHARITY COMMISSION  
FOR ENGLAND AND WALES**

## **Trustees' Annual Report for the period**

**From 1<sup>st</sup> January 2023  
Period end date**

**Period start date To 31<sup>st</sup> December 2023**

**Charity name: Penrith & District Beekeepers Association**

**Charity registration number: 1170487**

### **Objectives and Activities**

|  | SORP reference     |  |
|--|--------------------|--|
| Summary of the purposes of the charity as set out in its governing document  | Para 1.17          | The objects of Penrith and District Beekeepers Association CIO are to preserve the honeybee by promoting the craft of beekeeping and educating the public of the benefit of bees in the environment.   |
| Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts. | Para 1.17 and 1.19 | a) The promotion and improvement of beekeeping in Penrith and the surrounding area.<br><br>b) The control and, where possible, the eradication of diseases and disorders of honeybees.<br><br>c) The raising of public awareness of the importance of bees to the environment. |
| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit   | Para 1.18          | All Trustees receive the CC Guidance document and receive training as part of their induction as new trustees.   |

### **Additional information (optional)**

You may choose to include further statements where relevant about:

|                                 | SORP reference |  |
|---------------------------------|----------------|--|
| Contribution made by volunteers | Para 1.38      | All Trustees are volunteers and contribute to the running, monitoring and financial management of the charity. Members also voluntarily support the activities of the charity which enable it to meet its charitable objectives. |

## Achievements and Performance

|   | SORP reference |   |
|---|----------------|---|
| Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole. | Para 1.20      | <p><b>Education:</b> The Penrith and District Beekeepers Association (PDBKA) 2023 Calendar was sold and distributed across the local area and beyond. It contained information about bees, beekeeping and bee friendly plants. Sales of 2024 PDBKA Calendar began in the autumn 2023.</p> <p>Resources were bought and obtained so that an information table, manned by trustees with handouts about the Asian Hornet was used at Acorn Bank during weekends throughout the summer season, to raise the awareness of the general public to the dangers of the Asian Hornet and how it should be reported as a non-native invasive species if spotted.</p> <p>School projects about the value of honey bees and their life cycle were undertaken at three primary schools: St. Catherine's (110) Milburn Primary School (45) pupils, Pennine Way Primary School (40) and a nursery school: Eden Cottage Nursery School, Kirkby Stephen (30)</p> <p>Presentations were made to local interest groups including three WI groups : Lazonby; Caldbeck; Kirkby Thore.</p> <p>Workshops about bees were provided to Kirkby Stephen Beavers and Scouts (50)</p> <p>A day of workshops about bees involving 100 girl guides and twenty leaders took place at Blencathra Field Studies Centre in July 2023.</p> <p><b>Training for aspiring beekeepers:</b><br/>Introducing Beekeeper Course: June 2023. 14 attended. 100% recorded excellent to all aspects of the course.</p> <p><b>PBKA Stall and Observation hive at local events:</b> Kirkby Stephen Westmorland Dales Arts Event 31<sup>st</sup> July. . Approximately 30 people visited the stall during the day. Apple Day at Hutton in the Forest (1<sup>st</sup> October) Approximately 40 people visited the stall during the day.</p> <p><b>Swarm collection:</b> Total of 33 swarms were collected by team of 11 swarm</p> |



|  |  |   |
|--|--|---|
|  |  | collectors in response to requests received from the general public. The swarm collection process and the conversations that take place when inappropriate call outs are made, helps to educate the general public about how to identify bees and deal with them. 5 call outs related to bumble bee nests. 2 were visits to properties where bees had nested in inaccessible places and only advice could be given. For the first time, 2 calls were received where the callers reported sightings that they assumed were of Asian Hornets. |
|--|--|---|

### Additional information (optional)

You may choose to include further statements where relevant about:

|                                     |           |   |
|-------------------------------------|-----------|---|
| Achievements against objectives set | Para 1.41 | <p>All the achievements recorded in the PDBKA Development plan 2023 were achieved in the various sections except:<br/>-Planting for Pollinators in churchyards and local community areas as funding could not be raised for the purchase of the plants.</p> <p>Some progress was made towards the further development of an <b>arts project</b> which had already been deferred from 2022 because of covid: the feasibility of developing a mural to celebrate pollinators was explored during 2023. If external funds can be raised, then It will be installed in the tea room at Acorn Bank. Members of the community will work with the artist to create the work and learn more about pollinators through their involvement. Plans will be further developed and submitted for approval by the National Trust during 2024.</p> <p>A course designed to help members of the public learn more about <b>pollinators</b> and the way that they can be supported in order to reduce their further decline was developed in collaboration with Cumbria Wildlife Trust, Cumbria Beekeepers Association and the British Beekeepers Association. The course will feature as one of the programmes offered by Higham Hall Education Centre during 2024.</p> <p><b>The Training Apiary</b> continues to be a valuable training resource for both beginners and established beekeepers. It is managed by a team of three volunteers and the branch meetings held at Acorn Bank over the summer months were well attended, mainly by beginners.</p> |
|-------------------------------------|-----------|---|

|  |           |   |
|--|-----------|---|
|  |           |   |
| Performance of fundraising activities against objectives set | Para 1.41 | <p>£1145 sponsorship raised to support the development 2024 PDBKA Calendar.</p> <p>£645 raised through sales of 2023 Calendar contributed towards the costs of additional equipment to use by beekeepers looking after the Long Hive purchased in Dec 2022.</p> |

## Financial Review

|  |           |  |
|--|-----------|--|
| Review of the charity's financial position at the end of the period            | Para 1.21 | £12,597 of reserves carried forward includes restricted grant funding of £417 to complete the production of second phase of information display panels focusing on the Asian Hornet.   |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | Reserves are held to maintain the apiary in good repair in case of storm/ general wear and tear and to have funds available to replace colonies of bees and equipment in case of colony loss through disease etc. To purchase new/ up to date equipment for specialist bee husbandry purposes. |
| Amount of reserves held  | Para 1.22 | Unrestricted funds held were £12,180   |

### Additional information (optional)

You may choose to include further statements where relevant about:

|  |           |   |
|--|-----------|---|
| The charity's principal sources of funds (including any fundraising) | Para 1.47 | <p>Member subscriptions</p> <p>Fund raising at events and activities such as raffles, 'bucket collections' and through initiatives such as the annual calendar, honey sales.</p> <p>Applications for grants/ funding awards from other charitable trusts for specific projects.</p> |
| A description of the principal risks facing the charity              | Para 1.46 | <p>Destruction of bee hives, colony losses due to adverse weather conditions or disease, destruction by non-native species, e.g. Asian Hornet; hive beetle; reportable viral diseases e.g. American Foulbrood which would require all colonies and equipment to be destroyed.</p>   |



## Structure, Governance and Management

|   |           |   |
|---|-----------|---|
| Description of charity's trusts:  |           |   |
| Type of governing document<br>(trust deed, royal charter)   | Para 1.25 | Constitution for CIO as recommended by the Charity Commission   |
| How is the charity constituted?<br>(e.g unincorporated association, CIO)  | Para 1.25 | CIO   |
| Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees | Para 1.25 | Trustees are elected by members at the AGM. The eligibility of the elected individuals are checked out against the Charity Commission criteria. |

### Additional information (optional)

You may choose to include further statements where relevant about:

|   |           |  |
|---|-----------|--|
| Policies and procedures adopted for the induction and training of trustees                | Para 1.51 | An induction pack is provided and this is followed up by an Induction Meeting with the Chair and another experienced Trustee, subject to their availability, prior to the new trustee attending their first board meeting. |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | PDBKA is affiliated to Cumbria Beekeepers Association (which comprises 5 branches from across north Cumbria)<br>CBKA is a regional constituent of the British Beekeeping Association – of which PDBKA is also a member.    |
| Relationship with any related parties   | Para 1.51 | Linked through the renewal of annual subscriptions from the PDBKA Membership to both Cumbria Beekeepers Association and the British Beekeepers Association.  |

## Reference and Administrative details

|                             |  |
|-----------------------------|--|
| Charity name                | Penrith and District Beekeepers Association        |
| Other name the charity uses | Penrith Beekeepers Association                     |
| Registered charity number   | 1170487  |
| Charity's principal address | 16 Byrnes Close<br>Plumpton<br>Penrith<br>CA11 9PE |
|                             |  |

# Names of the charity trustees who manage the charity

|    | Trustee name                      | Office (if any)  | Dates acted if not for whole year | Name of person (or body) entitled to appoint trustee (if any) |
|----|-----------------------------------|--|-----------------------------------|---|
| 1  | Margaret Riches                   | Chair  |                                   |   |
| 2  | Dominic Rhodes                    | Apiary Manager<br>Vice Chair                             |                                   |   |
| 3  | John Campbell Banks               | Treasurer  |                                   |   |
| 4  | Davina Solomon                    | Membership Secretary (April – Sep 2023)                  |                                   |   |
| 5  | Mark Gerrard Dasey                | Web site Manager + Membership Secretary (Sep – Dec 2023) |                                   |   |
| 6  | Stephen Marshall                  | Apiary Manager<br>Communications Secretary               |                                   |   |
| 7  | Patricia Margaret Norris          | Programme Development                                    |                                   |   |
| 8  | Richard Grange Backhouse          | Apiary Manager   |                                   |   |
| 9  | Catherine Bernadette Weightman    | Events Co-ordinator                                      |                                   |   |
| 10 | Stuart Alexander Cunningham Bowie | Data Protection Officer                                  |                                   |   |
| 11 | Owen John David Morgan            | Safeguarding Officer                                     |                                   |   |
| 12 | Peter Andrew Morgan               | Equipment Officer  | From 2 <sup>nd</sup> April 2023   |   |

## Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

|                                     |                 |                       |
|-------------------------------------|-----------------|-----------------------|
| Signature(s)                        | M. Riches       | M. Dasey              |
| Full name(s)                        | Margaret Riches | Mark Dasey            |
| Position (eg Secretary, Chair, etc) | Chair           | Membership Secretary. |
| Date                                | 13/5/24         |                       |





CHARITY COMMISSION  
FOR ENGLAND AND WALES

Penrith and District Beekeepers Association

1170487

## Receipts and payments accounts

CC16a

For the period  
from

01/01/2023

To

31/12/2023

### Section A Receipts and payments

|   | Unrestricted<br>funds<br>to the nearest<br>£ | Restricted<br>funds<br>to the nearest £ | Endowment<br>funds<br>to the nearest £ | Total funds<br>to the nearest £ | Last year<br>to the nearest £ |
|---|--|---|--|---------------------------------|-------------------------------|
| <b>A1 Receipts</b>                                    |  |   |  |                                 |                               |
| Subscriptions   | 5,319  | -                                       | -                                      | 5,319                           | 2,833                         |
| Brood diseases insurance premiums                     | 129  | -                                       | -                                      | 129                             | 153                           |
| Events  | 478  | -                                       | -                                      | 478                             | 608                           |
| Training  | 1,780  | -                                       | -                                      | 1,780                           | 1,030                         |
| Donations   | 171  | -                                       | -                                      | 171                             | 1,124                         |
| Fundraising activities                                | 5,062  | -                                       | -                                      | 5,062                           | 5,211                         |
| Grants  | 1,000  | -                                       | -                                      | 1,000                           | 1,750                         |
| Varroa treatment                                      | 92   | -                                       | -                                      | 92                              | 326                           |
| Gift aid recoverable                                  | 1,618  | -                                       | -                                      | 1,618                           | 790                           |
| Bank interest receivable                              | 80   | -                                       | -                                      | 80                              | 15                            |
| <b>Sub total (Gross income for AR)</b>                | <b>15,729</b>                                | <b>-</b>                                | <b>-</b>                               | <b>15,729</b>                   | <b>13,840</b>                 |
| <b>A2 Asset and investment sales, (see table).</b>    |  |   |  |                                 |                               |
|   | -  | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b>                                      | <b>-</b>                                     | <b>-</b>                                | <b>-</b>                               | <b>-</b>                        | <b>-</b>                      |
| <b>Total receipts</b>                                 | <b>15,729</b>                                | <b>-</b>                                | <b>-</b>                               | <b>15,729</b>                   | <b>13,840</b>                 |
| <b>A3 Payments</b>                                    |  |   |  |                                 |                               |
| Subscriptions   | 2,111  | -                                       | -                                      | 2,111                           | 2,188                         |
| Brood diseases insurance premiums                     | 293  | -                                       | -                                      | 293                             | 271                           |
| Equipment, apiary development and insurance           | 1,832  | -                                       | -                                      | 1,832                           | 2,692                         |
| Apiary manager travel                                 | 139  | -                                       | -                                      | 139                             | 504                           |
| Apiguard, MAQ's and apibioxal                         | -  | -                                       | -                                      | -                               | 338                           |
| Exhibition panels                                     | -  | -                                       | -                                      | -                               | 583                           |
| Events costs  | 375  | -                                       | -                                      | 375                             | 703                           |
| Hive geometrix  | -  | -                                       | -                                      | -                               | 1,881                         |
| Training costs  | 905  | -                                       | -                                      | 905                             | 762                           |
| Meeting, talks and speaker costs                      | 441  | -                                       | -                                      | 441                             | 1,605                         |
| Postage and printing                                  | 233  | -                                       | -                                      | 233                             | 713                           |
| Fundraising expenses                                  | 4,461  | -                                       | -                                      | 4,461                           | 3,788                         |
| Sundry expenses                                       | 131  | -                                       | -                                      | 131                             | 388                           |
| Website costs   | 60   | -                                       | -                                      | 60                              | 60                            |
| Accountancy   | 85   | -                                       | -                                      | 85                              | 80                            |
| <b>Sub total</b>                                      | <b>11,066</b>                                | <b>-</b>                                | <b>-</b>                               | <b>11,066</b>                   | <b>16,576</b>                 |
| <b>A4 Asset and investment purchases, (see table)</b> |  |   |  |                                 |                               |
|   | -  | -                                       | -                                      | -                               | -                             |
| <b>Sub total</b>                                      | <b>-</b>                                     | <b>-</b>                                | <b>-</b>                               | <b>-</b>                        | <b>-</b>                      |
| <b>Total payments</b>                                 | <b>11,066</b>                                | <b>-</b>                                | <b>-</b>                               | <b>11,066</b>                   | <b>16,576</b>                 |
| <b>Net of receipts/(payments)</b>                     | <b>4,663</b>                                 | <b>-</b>                                | <b>-</b>                               | <b>4,663</b>                    | <b>(2,736)</b>                |
| <b>A5 Transfers between funds</b>                     | <b>-</b>                                     | <b>-</b>                                | <b>-</b>                               | <b>-</b>                        | <b>-</b>                      |
| <b>A6 Cash funds last year end</b>                    | <b>7,517</b>                                 | <b>417</b>                              | <b>-</b>                               | <b>7,934</b>                    | <b>10,670</b>                 |
| <b>Cash funds this year end</b>                       | <b>12,180</b>                                | <b>417</b>                              | <b>-</b>                               | <b>12,597</b>                   | <b>7,934</b>                  |

## Section B Statement of assets and liabilities at the end of the period

| Categories    | Details                  | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Endowment funds<br>to nearest £ |   |
|---------------|--------------------------|------------------------------------|----------------------------------|---------------------------------|---|
| B1 Cash funds | Bank Current Account     | 7,806                              | 417                              | -                               |   |
|               | Building Society Account | 4,312                              | -                                | -                               |   |
|               | Cash                     | 62                                 | -                                | -                               |   |
|               | Total cash funds         |                                    | 12,180                           | 417                             | - |

[illegible]

| B3 Investment assets | Details | Fund to which asset belongs | Cost (optional) | Current value (optional) |
|----------------------|---------|-----------------------------|-----------------|--------------------------|
|                      |         |                             | -               | -                        |
|                      |         |                             | -               | -                        |
|                      |         |                             | -               | -                        |
|                      |         |                             | -               | -                        |
|                      |         |                             | -               | -                        |

[illegible]

| Details | Fund to which liability relates | Amount due (optional) | When due (optional) |
|---------|---------------------------------|-----------------------|---------------------|
|         |                                 | -                     |                     |
|         |                                 | -                     |                     |
|         |                                 | -                     |                     |
|         |                                 | -                     |                     |
|         |                                 | -                     |                     |

Signed by one or two trustees on behalf of all the trustees

Signature

Print Name

Date of approval

M. has  
m 2

|           |
|-----------|
| M. RICHES |
| M. DASEI  |

| approval |   |    |
|----------|---|----|
| 7        | 4 | 24 |
| 7        | 4 | 24 |



**Penrith and District Beekeepers Association  
Chartered Accountants report  
for the period ended 31 December 2023**

We have prepared for your approval the financial information of the Penrith and District Beekeepers Association for the period, which comprises of the receipts and payments statement and the balance sheet, from the entity's accounting records and from information and explanations you have given us.

As a practising member of the Institute of Chartered Accountants in England and Wales (ICAEW), we are subject to its ethical and other professional requirements which are detailed at [icaew.com/membershandbook](http://icaew.com/membershandbook).

This report is made solely to you, in accordance with the terms of our engagement letter. Our work has been undertaken solely to prepare for your approval the financial information of Penrith and District Beekeepers Association and state those matters that we have agreed to state to you in this report in accordance with the guidance of ICAEW as detailed at [icaew.com/compilation](http://icaew.com/compilation). To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than Penrith and District Beekeepers Association for our work or for this report.

You have approved the financial information for the year and have acknowledged your responsibility for it, for the appropriateness of the financial reporting framework adopted and for providing all information and explanations necessary for its compilation.

We have reviewed the accounting records supplied and vouched year end bank balances to bank statements.

APB Bookkeeping Services Limited  
Chartered Accountants  
89 Pennyhill Park  
Penrith  
CA11 9JW

Date 8th March 2024