

YORKSHIRE FUNDERS

England & Wales · Charity number 1196519

Details

Status Registered

Legal form CIO

Registered 2021-11-11

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

Contact

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Skipton Road
Ilkley
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Activities

Objects: THE PROMOTION OF THE EFFECTIVE USE OF RESOURCES FOR CHARITABLE PURPOSES BY CHARITABLE AND NON-CHARITABLE BODIES IN YORKSHIRE AND THE HUMBER FOR THE BENEFIT OF THE PUBLIC BY:• PROVIDING ADVICE AND INFORMATION PARTICULARLY ON FUNDING AND SOCIAL INVESTMENT;• PROMOTING OPPORTUNITIES TO FACILITATE CO-OPERATION AND COLLABORATION;• PROVIDING RESOURCES AND FUNDING;• PROVIDING TRAINING AND INFORMATION AND FACILITATING THE EXCHANGE OF INFORMATION, KNOWLEDGE AND EXPERIENCE, AND;• ENABLING FUNDING ORGANISATIONS TO PROVIDE SUPPORT AND FUNDING MORE EFFECTIVELY.

Activities: Yorkshire Funders provides opportunities for local funding organisations of all sizes and sectors to think, share, learn and act together in order to be more effective and boost their impact on Yorkshire and Humber places and people. In turn, the work of Yorkshire Funders aims to improve the conditions of life of people who live and work in Yorkshire and the Humber.

Classification

- **How:** Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body
- **What:** General Charitable Purposes, Economic/community Development/employment
- **Who:** Children/young People, Elderly/old People, People With Disabilities, People Of A Particular Ethnic Or Racial Origin, Other Charities Or Voluntary Bodies

Geography

- Throughout England

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£49,075	£57,145	-	-
2024-03-31	£60,190	£26,927	-	-
2023-03-31	£31,187	£17,937	-	-

Trustees

Name	Role	Appointed
BRUCE CHARLES WARNES		2023-02-07
David Timothy Warner		2023-04-24
Gemma Brookes		2023-11-06
Imogen Graham		2023-11-06
Kath Lindley		2023-08-07
TIMOTHY CUTTS		2021-11-11

YORKSHIRE FUNDERS

England & Wales - Charity number 1196519

Accounts

ANNUAL REPORT & FINANCIAL STATEMENTS 2024-25





CHAIR'S INTRODUCTION

It is with real pride and optimism that I introduce our third Annual Report for 2024/25, marking a year of bold steps forward for Yorkshire Funders. 2024/25 was not just a year of continuity, but of clear progress. We've grown stronger as a network, deeper in our influence, and sharper in our focus. In a time of continued social and economic strain, the need for funders to be more collaborative, open, and effective has never been greater. Yorkshire Funders has responded with ambition, clarity, and action.

This year, **membership grew to 73 organisations**, an 11% increase from our inaugural year, cementing our position as one of the UK's most dynamic regional networks for grantmakers.

The diversity of our members - from national funders to local authorities, community foundations, corporates, infrastructure bodies, and individuals - has made our conversations richer and our collective learning more powerful.

We launched our inaugural Members' Day, creating a dedicated space for reflection and action on funder effectiveness. We expanded our events and training offer, supported key initiatives such as the **Yorkshire Common Application Form**, and crucially, we appointed our **first staff member**, significantly increasing our ability to deliver meaningful work.

Our members reported high levels of satisfaction - with **63% rating membership as 'highly valuable,'** and many citing our training, networking and collaborative opportunities as key benefits. This is not just encouraging; it's a mandate to go further.

Importantly, we've seen a real shift in funding behaviours across the network: more **core and unrestricted funding**, more **multi-year grants**, and growing commitment to **open, trusting** relationships - backed by initiatives like IVAR's 'Open and Trusting Community' and more networks and opportunities to meet with and learn from one another.

All of this lays a solid foundation for our ambitions in 2025/26 with our **four strategic priorities**:

1. **Growing our membership** - with a clear goal to reach 100 members by 2026, while retaining the quality and engagement that defines us.
2. **Bringing people together** - continuing to offer inclusive, thought-provoking events that spark collaboration and long-term partnerships.
3. **Championing best practice** - through training, peer learning, and by supporting our members to adopt shared tools and principles around transparency, diversity, and equality.
4. **Driving Regional Change** - positioning Yorkshire Funders as a key voice for philanthropy and funding in the region.

Achieving all of this will depend on building a **diverse, sustainable income base**, including continued support from our core funders, event income and member contributions. Any surplus from this year will be used to strengthen our staffing and capacity in 2025/26. My appreciation goes to my fellow trustees and the small but mighty team of Alex, Carla and Jan who continue to maintain the high regard our members and partners have for Yorkshire Funders.

Yorkshire Funders is about more than sharing knowledge - it's about shifting how funding happens. And in 2024/25, we showed what's possible when funders come together with humility, ambition, and purpose. I look forward to what we can achieve together in the year ahead.



TIM CUTTS

Yorkshire Funders, Chair

LEGAL & ADMINISTRATON INFORMATION

Trustees

Peter Timothy Cutts	Chair	Resigned & Reappointed 18th November 2024
Gemma Brookes	Trustee	Appointed 6th November 2023
Imogen Graham	Trustee	Appointed 6th November 2023
Kath Lindley DL	Trustee	Appointed 8th August 2023
David Warner MBE	Trustee	Appointed 24th April 2023
Bruce Warnes	Trustee	Resigned & Reappointed 18 th November 2024

Consultants and Staff

Jan Garrill DL	Associate Director
Carla Marshall	Consultant
Alex Hartley	Events, Communication & Administration Officer

Registered Office

Harlig House
Skipton Road
Ilkley
LS29 9RP

Bankers

HSBC
8 Canada Square
London
E14 5HQ

Auditors

Hunter Gee Holroyd
Club Chambers
Museum Street
York
YO1 7DN

Charitable Incorporated Organisation
Registration Number: 1196519

OBJECTIVES

Charitable Purpose

The objects of Yorkshire Funders CIO are:

The promotion of the effective use of resources for charitable purposes by charitable and non-charitable bodies in Yorkshire and the Humber for the benefit of the public by:

- providing advice and information, particularly on funding and social investment.
- promoting opportunities to facilitate cooperation and collaboration.
- providing resources and funding.
- providing training and information and facilitating the exchange of information, knowledge and experience.
- enabling funding organisations to provide support and funding more effectively.

Yorkshire Funders' constitution is of a Charitable Incorporated Organisation with voting members other than its charity trustees.

Aims & Public Benefit

Yorkshire Funders provides opportunities for local funding organisations of all sizes and from all sectors to think, share, learn and act together in order to be more effective and boost their impact on Yorkshire people and places.





ACHIEVEMENTS

Yorkshire Funders solidified its place as one of the most effective and influential regional networking and learning organisations for grantmakers in the UK. *Validation from IVAR.

73 grant-making organisations became Yorkshire Funders' members during the second official membership year, 11% more than the 66 members in our first year.

As a network, we are proud of the reach we achieve across all the various types of funders:

- Independent Trusts and Foundations (including national funders based in- and outside Yorkshire)
- Community Foundations
- Corporate Foundations
- Local Authority and other Public Sector members
- Infrastructure Support Organisations
- Professional support businesses/advisors
- Individuals

Having such a diversity of members brings rich insights and reminds all of us that there is no one single way to distribute funds, but we all share the common goal of making the best impact we can with our funds.

ACHIEVEMENTS

Members have continued to be well engaged in Yorkshire Funders' programme of activities and continue to give overwhelmingly positive feedback on the charity's activities, including offering suggestions for future training, which are welcomed.

In the charity's annual satisfaction survey, **63% of members rated their membership as being highly valuable**, with the remainder rating it as quite valuable.

Members are also encouraged to provide feedback on the charity and what it can improve in the future:

“It offers a fantastic way to connect with other like-minded organisations, right across the Yorkshire and Humber region. The quality of service is amazing, you always feel valued. We are so lucky to be part of Yorkshire Funders!”

Yorkshire Funders continued to grow its membership in 2024/25, enabling the charity to hold more events and activities in 2025/26 and to recruit our first member of staff. We appointed Jaesha Ali in March 2024 and following Jaesha's resignation in September 2024, we appointed Alex Hartley in January 2025. Jan Garrill and Carla Marshall offer their support as Associates and together the three team members ensure we give members and partners a sustained and good quality programme of support and activity.

Having a paid member of staff has made a significant difference in how we work, giving us the capacity to ensure our events remain well managed and engaging whilst also having the ability to set longer-term goals for membership growth, developing our offer to members and ultimately ensuring we serve our mission of a Yorkshire where communities thrive, opportunities are accessible to all, and lives are improved through equitable and effective funding.

PROGRAMME OF ACTIVITY

Our core activity comprises three main activities:

- 1. Events and Training - including in-person and online events plus our Annual Conference and Members' Day**
- 2. Regular communication via newsletter and website**
- 3. Developing partnerships and collaborations**

All of our activities above are funded through a combination of:

- **Membership fees**
- **Corporate sponsorship**
- **Core support from members**
- **Income from events and training**

Events and Training

2024/25 featured a packed programme of 17 events, combining learning, networking and continuing professional development.

As well as the Annual Conference, a highlight for the Yorkshire grant-making community, these events took place both in person and online, according to the material being covered and the type of session delivered. In 2024, we established our Member's Day and AGM in the autumn as a sister to the Annual Conference in the summer. Both these events are 'must attend' opportunities for members to spend quality time with each other and experts in the field of funding to reflect and learn.

Our training and webinar programmes included specific areas of training around grantmaking designed to upskill funders and trustees, and general topical discussions led by experts in their field, encouraging best practice, process development and trends from within the sector.

Many of the sessions held stemmed directly from feedback from members, as well as the network of VCSE experts connected to Yorkshire Funders' trustees and Associate Director, all of whom work for and/or are on the board of a grant-making organisation.

PROGRAMME OF ACTIVITY

Online events are free for members as a benefit of membership and in-person training events remain keenly priced, with member- and non-member rates offered.

We are grateful to Wrigleys and Quilter Cheviot who provide their board rooms free of charge for many of our training events. This allows us to offer members good venues within our goal of events being affordable for funders.

An online feedback survey was sent to all participants after every in-person training workshop or event. Where appropriate, an event summary as well as useful resources were posted on the Yorkshire Funders website:

www.yorkshirerefunders.org.uk/resources/resources-from-events/

Events Held in 2024-25

Date	Event Name	Event Type	Attendees
24 Apr 2024	Multi-year Funding Workshop	Online	17
22 May 2024	Understanding Applicant finances	In Person	12
19 June 2024	Annual Conference	In Person	118
26 June 2024	Be a Better Grants Assessor	In Person	11
10 July 2024	Be a Better Grants Assessor	In Person	14
14 Aug 2024	Grant Management Systems	Online	25
19 Sep 2024	Hearing from the Frontline	Online	27
9 Oct 2024	Be a Better Grants Assessor	In Person	17
7 Nov 2024	Communication & Social Media for Funders	Online	18
18 Nov 2024	Members' Day	In Person	68
22 Jan 2025	Be a Better Grants Assessor	In Person	10
28 Jan 2025	Moving Towards Unrestricted & Multi-year Grants	Online	23
11 Feb 2025	Duties of a Trustee	Online	19
26 Feb 2025	Understanding Applicant Finances (Intro to)	In Person	13
13 Mar 2025	AI in Grantmaking	Online	35
19 Mar 2025	Understanding Applicant Finances (Advanced)	In Person	16
26 Mar 2025	Chairs and Trustees Networking	In Person	26

PROGRAMME OF ACTIVITY

164 members attended a wide range of online workshops in 2024/25, with 93 attendees at in-person training sessions during the year. The charity's marquee conference in June attracted 118 delegates, with 68 attending the November Members' Day & AGM.

Member Communications

Monthly Sector News Update

Yorkshire Funders researched, curated and distributed a monthly e-newsletter via Mailchimp, containing information and news from influential third sector organisations including NCVO, PBE, IVAR, NPC, Joseph Rowntree Foundation, Centre for Social Justice and ACF. The newsletter also featured events and job adverts for trustees and employees at local grant-making organisations.

www.yorkshirefunders.org.uk

The website was updated on a regular basis, with key news from the sector and an updated events programme. The resources page of the website continued to be an important source of information for members, with information from events held and the wider sector featured.

LinkedIn

Yorkshire Funders continued to be active on LinkedIn and to build an online network within the sector, sharing member news, articles and events of interest.

Partnerships and Collaboration

Corporate Partners

The charity is incredibly grateful for McInroy & Wood and Wrigleys Solicitors' support in 2024/25. Both companies provided vital financial support and Wrigleys also provided its board room for training events as well as speaking at a number of events. Yorkshire Funders' Associate Director, Jan Garrill, also established a strong working relationship with the Yorkshire office of the investment management firm Quilter Cheviot, who provided a training room.

PROGRAMME OF ACTIVITY

Yorkshire Common Application Form (YCAF) & Aligned Working Network

Yorkshire Funders continued to promote the adoption of the YCAF and by March 2024 had 13 local grantmakers using the application form. The newly-formed Aligned Working Network, which met online three times during the 2024/25 period, took responsibility for reviewing the YCAF and made updates to the form to ensure it works well both for grantseekers and grantmakers. The Aligned Working Network also started discussions about creating a Common End of Report Form as many grantholders have also expressed an interest in this.

Local Funders Forums and Funding Advice Workers Network (FAWN)

Yorkshire Funders' Trustees and Associates continued to attend the South Yorkshire and Wakefield Funders Forums, learning from these groups and sharing information. Yorkshire Funders Associates also maintained regular contact with the FAWN Secretary and Chair, ensuring they could share intelligence at events and in the newsletter.

Membership Scheme

During 2024/25, the Yorkshire Funders team continued to work hard to build up funds and ensure sustainability for the long term, reaching 73 members by March 2025. Grantmakers from Cumbria and Lincolnshire also became members as they had heard such good things about Yorkshire Funders and didn't have a similar network in their regions.

Funder Financial Support

After 30 years of staffing and resource support from the Sir George Martin Trust, the Yorkshire Funders team approached a handful of other long-term attendees of Yorkshire Funders' events who were particularly supportive of the charity's work to see if they would become a Core Supporter and give £5,000 to enable the charity to appoint and fund its first member of staff, as well as funding Jan Garrill, former Yorkshire Funders' trustee as the new Associate Director. It is so fantastic that The BRELMs Trust, R.E. Chadwick Charitable Trust and the Sir George Martin Trust all gave their support, which ensured the charity was in a very strong financial position by the end of 2024/25.

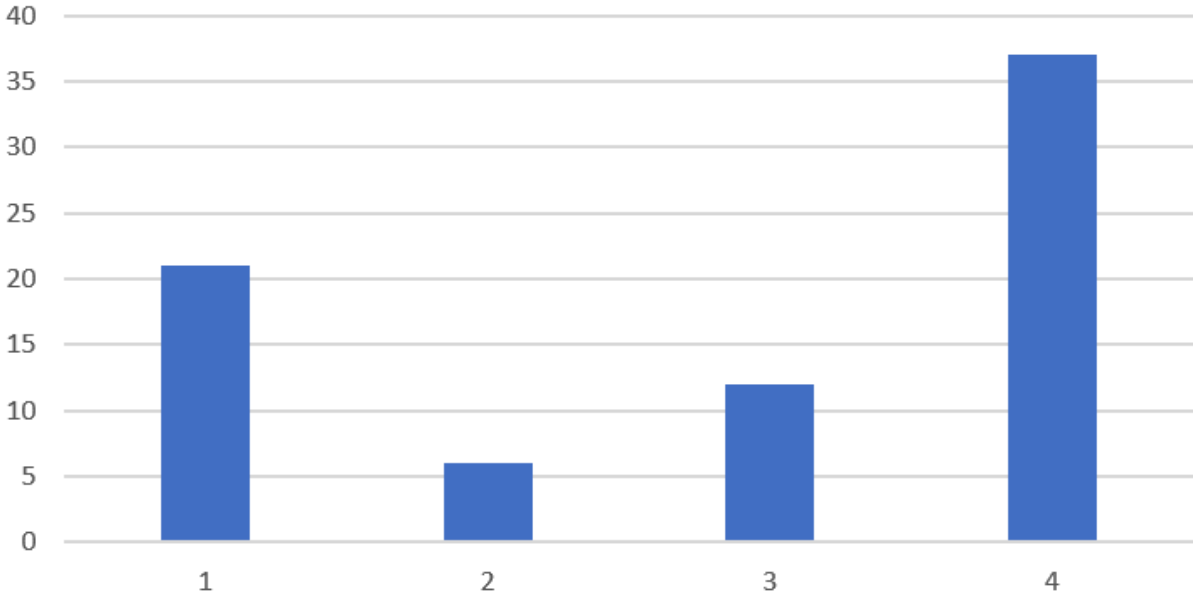
2024/25 MEMBER OVERVIEW

Yorkshire Funders' Membership - end March 2025 by Category



- Corporate Foundation
- Public Sector
- Professional Advisor
- Infrastructure org
- Individual
- Independent Grant making trust
- Community Foundation

2024/25 Yorkshire Funders Membership by band



Band Level	Grant Expenditure	Annual Membership Amount
1	under £100,000	£99
2	£101,000-£250,000	£165
3	£251,000-£500,000	£275
4	over £500,000	£385



PLANS FOR THE FUTURE

For 2025/26, the focus will be on our four strategic goals, as agreed by the trustees in 2024/25 for the next three years:

- 1. Growing our membership - with an aspiration to reach 100 members by 2026.**
- 2. Bringing people together - to support greater funder collaboration.**
- 3. Sharing and advocating for best practice in funding - with more members signed up to good practice activity like IVAR Open and Trusting, placing their data on 360Giving and addressing the need for greater trustee diversity.**
- 4. Working together to drive positive change for the region - becoming the 'go to' advocate for philanthropy in our region and recognised for the collective insights and funding the network can deliver.**

PLANS FOR THE FUTURE

We will aim to achieve this in 2025/26 by:

- Maintaining a diverse and interesting range of webinars and training as well as using our Annual Conference and Members' Day face-to-face events to provide challenge and inspiration.
- Improving our website generally and providing a space for members to share good practice.
- Supporting the YCAF task group to develop the common application form and look to develop common monitoring approaches.
- Enhancing our offer to members through increasing thematic and geographic networks where longer-term trust and collaborations might emerge.
- Developing stronger partnerships with representatives of groups that are funded so that we can share their insights back to funders to help inform practice.
- Determining the optimum approach to mapping and sharing data on activity and need in our region.
- Building firmer partnerships with key national organisations working in the funder space - e.g. IVAR, Centre for Social Justice, PBE, NPC, CAST, 360Giving, London Funders and Funder Safeguarding Collaborative so that we can bring their insights and expertise to the network.

To deliver this, we will need to build a diverse and steady income stream from membership, events and sponsorship as well as continuing to have a small number of core supporters from our network. Any surplus from 2024/25 funds will be carried over to go towards staffing and running costs.

GOVERNANCE & MANAGEMENT

Trustee Roles and Responsibilities

Yorkshire Funders is governed by a voluntary board of six trustees who are collectively responsible for the charity's strategic direction, financial oversight and legal compliance. Trustees ensure that our work aligns with our mission and values, and that we operate transparently, sustainably and effectively.

Our trustees bring a wide range of experience and insight and work closely with staff and consultants to shape and monitor Yorkshire Funders' activities. All are active or recent past trustees or senior leaders of funding organisations in the region. They meet formally four times a year, with additional meetings as needed, and contribute actively to events, decision-making, and key areas such as finance, policy and governance.

We hold our Annual General Meeting at the close of our Members' Day in the autumn and welcome questions and discussions with members about past performance and future plans.

Trustees are in effect appointed for three-year terms which are renewable up to three consecutive terms. At each AGM our constitution requires a third of trustees to resign and they can be reappointed for a maximum of three consecutive terms. Succession planning is regularly reviewed to ensure a strong mix of skills and perspectives. In 2024/25 we carried out a skills audit of trustees and identified a plan for addressing gaps in expertise. The role is unpaid, although reasonable expenses are reimbursed.

Commitment to Equality, Diversity and Inclusion (DEI)

Yorkshire Funders is committed to the organisation and its trustee board reflecting the diversity of Yorkshire, the people who live here and the communities our members fund. As the charity develops, it is important that the trustee board is made up of a range of different people which reflect its members and the Yorkshire region.

Yorkshire Funders will work to ensure that every individual on the trustee board and all consultants have equal opportunities by being conscious of and actively

GOVERNANCE & MANAGEMENT

challenging bias or prejudice, to make sure no one is treated less favourably because of who they are or what makes them different from other people.

We recognise we are all different in many ways and trustees and consultants with differing identities, backgrounds and experiences should all have equitable access to resources and decision making at Yorkshire Funders. We are also proactive to make sure people of different backgrounds, experiences and identities feel welcomed, respected and fully able to participate and we aim to not only create a diverse environment, but also to ensure that a culture exists where individuals can be their true selves.

Recruitment, Induction and Training of New Trustees

The Board keeps the skill requirements for the Trustee Body under review with the consultants. Recruitment of new trustees is promoted amongst the Yorkshire Funders' membership and dialogue with interested parties is overseen by the Associate Director. When an individual expresses an interest in becoming a trustee, a meeting is held with the trustees, Associate Director and the Coordinator. If the board agrees, the candidate will be invited to attend a Yorkshire Funders' board meeting and if the candidate would like to join the board, the appointment will be made. The Associate Director or Coordinator ensures that each new trustee is provided with the Trustee Guide, the Charity Commission's Essential Trustee Document and will provide telephone, Zoom and in-person support as required. Taking part in Yorkshire Funders' events and training sessions ensures ongoing training and professional development for each trustee.

Sustainability Statement

Yorkshire Funders is committed to operating in a way that is environmentally responsible and socially conscious. In 2024/25, we continued to embed sustainability into our operations, recognising our responsibility to model good practice as a values-led charity. Wherever possible, we prioritise working with organisations that align with our mission and sustainability goals.

This year, we produced our website locally, supporting a Yorkshire-based

GOVERNANCE & MANAGEMENT

provider and moved to using a B-corp certified organisation, Ticket Tailor for our event booking - ensuring our digital infrastructure reflects our commitment to ethical, transparent business practices.

Our day-to-day operations remain low impact: we work remotely, keeping travel to a minimum and avoiding the need for a physical office, while paper use is limited across all activities. The majority of our events are held online, which not only increases accessibility but also reduces carbon emissions. For in-person gatherings such as our Members' Day, we make deliberate choices to use charitable or social enterprise providers, supporting the wider social sector ecosystem while reducing environmental impact. We will continue to review and improve our practices to ensure sustainability remains embedded in how we deliver our mission.

PUBLIC BENEFIT STATEMENT

The Directors of the CIO have considered the general guidance on public benefit issued by the Charity Commission in carrying out its objectives and activities and in delivering public benefit to the many institutions provided with financial and general help and are satisfied that the objectives fall under the provisions of the Charities Act 2011.

FINANCIAL REVIEW

Reserves Policy

The trustees agreed that the charity should generally aim for three to six months' unrestricted expenditure in reserves which would be £10,800 to £21,600. The purpose of this is to ensure the charity can meet its contractual payments and continue providing services to its members.

Membership fees

The membership fees for 2024/25 were maintained at similar levels to the previous year but we amended the membership package so that members no longer received free place(s) at the annual conference. This change was implemented successfully and the 2025 conference was fully booked, with all direct costs covered.

Summary of fund balances at 31st March 2025:

Unrestricted: £39,341

Restricted: £12,758

Commitments

The trustees had made no commitments to future capital purchases, nor given any guarantees, at the balance sheet date.

Approved by the Board of Trustees on 24th November 2025 and signed on their behalf by:



Tim Cutts
Chair

STATEMENT OF TRUSTEES RESPONSIBILITIES

The trustees of Yorkshire Funders are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England & Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping sufficient accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Yorkshire Funders			Charity No (if any)	1196519
Annual accounts for the period				
Period start date	01/04/2024	To	Period end date	31/03/2025

Section A Statement of financial activities

Recommended categories by activity	Unrestricted funds	Restricted income funds	Endowment funds	Total funds	Prior year funds
	£	£	£	£	£
	F01	F02	F03	F04	F05
Incoming resources (Note 3)					
Income and endowments from:					
Donations and legacies	38,690	-	-	38,690	47,209
Charitable activities	10,385	-	-	10,385	5,585
Other trading activities	-	-	-	-	-
Investments	-	-	-	-	-
Separate material item of income	-	-	-	-	-
Other	-	-	-	-	-
Total	49,075	-	-	49,075	52,794
Resources expended (Note 6)					
Expenditure on:					
Raising funds	5,952	-	-	5,952	-
Charitable activities	38,435	12,758	-	51,193	27,325
Separate material item of expense	-	-	-	-	-
Other	-	-	-	-	-
Total	44,387	12,758	-	57,145	27,325
Net income/(expenditure) before investment gains/(losses)	4,688	- 12,758	-	8,070	25,469
Net gains/(losses) on investments	-	-	-	-	-
Net income/(expenditure)	4,688	- 12,758	-	8,070	25,469
Extraordinary items	-	-	-	-	-
Transfers between funds	-	-	-	-	-
Other recognised gains/(losses):					
Gains and losses on revaluation of fixed assets for the charity's own use	-	-	-	-	-
Other gains/(losses)	-	-	-	-	-
Net movement in funds	4,688	- 12,758	-	8,070	25,469
Reconciliation of funds:					
Total funds brought forward	39,341	12,758	-	52,099	26,630
Total funds carried forward	44,029	-	-	44,029	52,099

Charity Name: Yorkshire Funders	Charity No	1196519
	Company No	
Annual accounts for the period	Period start date: 01/04/2024	To period end date: 31/03/2025
Section B Balance sheet		

Guidance note	Unrestricted funds £	Restricted		Total this year £	Total last year £
		income funds £	Endowment funds £		
	F01	F02	F03	F04	F05
Fixed assets					
Intangible assets (Note 15)	-	-	-	-	-
Tangible assets (Note 14)	367	-	-	367	899
Heritage assets (Note 16)	-	-	-	-	-
Investments (Note 17)	-	-	-	-	-
Total fixed assets	367	-	-	367	899
Current assets					
Stocks (Note 18)	-	-	-	-	-
Debtors (Note 19)	5,960	-	-	5,960	5,984
Investments (Note 17.4)	-	-	-	-	-
Cash at bank and in hand (Note 24)	40,224	-	-	40,224	46,513
Total current assets	46,184	-	-	46,184	52,497
Creditors: amounts falling due within one year (Note 20)	2,522	-	-	2,522	1,297
Net current assets/(liabilities)	43,662	-	-	43,662	51,200
Total assets less current liabilities	44,029	-	-	44,029	52,099
Creditors: amounts falling due after one year (Note 20)	-	-	-	-	-
Provisions for liabilities	-	-	-	-	-
Total net assets or liabilities	44,029	-	-	44,029	52,099
Funds of the Charity					
Endowment funds (Note 27)	-	-	-	-	-
Restricted income funds (Note 27)					12,758
Unrestricted funds	44,029	-	-	44,029	39,341
Revaluation reserve					
Fair value reserve					
Total funds	44,029	-	-	44,029	52,099

The company was entitled to exemption from audit under s477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act with These accounts have been prepared in accordance with the provisions applicable to small companies subject to the small companies regime and in accordance with FRS102 SORP.

Signed by one or two trustees/directors on behalf of all the trustees/directors	Signature	Print Name	Date of approval
	P.T. CUTTS	P.T. CUTTS	

2024/25 ACCOUNTS - EXPLANATORY NOTE

The trustees have agreed to adopt accrual-based accounting from the 2024/5 accounts onwards. The trustees have made this decision because, as a membership organisation, they want their accounts to show the financial affairs of the charity on a true and fair basis. This is important for openness and transparency to our membership.

YORKSHIRE FUNDERS

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF

YORKSHIRE FUNDERS

I report to the trustees on my examination of the accounts of Yorkshire Funders (the charity) for the year ended 31st March 2025.

Responsibilities and basis of report

As the charity trustees of the charity you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('The Act').

I report in respect of my examination of the Trustee's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the charity Commissioner under section 145(5)(b) of the 2011 Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

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

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.

Nigel Everard BA FCA
Hunter Gee Holroyd
Club Chambers
Museum Street
York YO1 7DN

24th September 2025

YORKSHIRE FUNDERS

England & Wales - Charity number 1196519

Accounts

ANNUAL REPORT & FINANCIAL STATEMENTS 2023-24





CHAIR'S INTRODUCTION

I am pleased to be introducing the second Trustees' Annual Report for Yorkshire Funders CIO. It's been another fantastic year of growth in activities, partnerships, and outcomes for the charity, following the launch of our official membership scheme in March 2023. The target was 40 members for 2023/24, and 66 local grantmaking and infrastructure organisations joined the membership and benefitted from 15 in-person and online learning and networking events to help them become better funders.

The board of trustees was bolstered greatly with David Warner MBE, Kath Lindley DL, Gemma Brookes, and Imogen Graham all joining this financial year and bringing a wealth of grantmaking and civil society expertise to the team. And after 25 years of hard work and dedication on the Yorkshire Funders' board, and on the Yorkshire Grant Makers Forum committee, trustee Stephen Robinson retired. Another key personnel change was that trustee Jan Garrill DL moved to become Associate Director.

TIM CUTTS

Yorkshire Funders, Chair

LEGAL & ADMINISTRATOR INFORMATION

Trustees

Peter Timothy Cutts	Chair	Appointed 21st November 2021
Gemma Brookes	Trustee	Appointed 6th November 2023
Jan Garrill DL	Trustee	Appointed 21st November 2021 Resigned 21st June 2023
Imogen Graham	Trustee	Appointed 6th November 2023
Kath Lindley DL	Trustee	Appointed 8th August 2023
Stephen Robinson	Trustee	Appointed 21st November 2021 Resigned 31st December 2023
David Warner MBE	Trustee	Appointed 24th April 2023
Bruce Warnes	Trustee	Appointed 7th February 2023

Registered Office

Harlig House
Skipton Road
Ilkley
LS29 9RP

Bankers

HSBC
8 Canada Square
London
E14 5HQ

Auditors

Wheawill & Sudworth
35 Westgate
Huddersfield
HD1 1PB

Charitable Incorporated Organisation

Registration Number: 1196519

OBJECTIVES

Charitable Purpose

The objects of Yorkshire Funders CIO are:

The promotion of the effective use of resources for charitable purposes by charitable and non-charitable bodies in Yorkshire and the Humber for the benefit of the public by:

- PROVIDING ADVICE AND INFORMATION PARTICULARLY ON FUNDING AND SOCIAL INVESTMENT;
- PROMOTING OPPORTUNITIES TO FACILITATE CO-OPERATION AND COLLABORATION;
- PROVIDING RESOURCES AND FUNDING;
- PROVIDING TRAINING AND INFORMATION AND FACILITATING THE EXCHANGE OF INFORMATION, KNOWLEDGE AND EXPERIENCE, AND;
- ENABLING FUNDING ORGANISATIONS TO PROVIDE SUPPORT AND FUNDING MORE EFFECTIVELY.

Yorkshire Funders' constitution is of a Charitable Incorporated Organisation with voting members other than its charity trustees.

Aims & Public Benefit

Yorkshire Funders provides opportunities for local funding organisations of all sizes and from all sectors to think, share, learn and act together in order to be more effective and boost their impact on Yorkshire people and places.





ACHIEVEMENTS

- Yorkshire Funders solidified its place as one of the most effective and influential regional networking and learning organisations for grantmakers in the UK.**Validation from IVAR.*
- During April 2023 - March 2024, Yorkshire Funders ran 15 networking and learning events which were attended by almost 400 employees and trustees from more than 75 different funding and infrastructure support organisations (many individuals attended multiple events).
- 66 grantmaking organisations became Yorkshire Funders' members during the first official membership year, 65% more than the target set by the trustees, which helped the region's grantmakers become better connected and informed.
- Yorkshire Funders increased its income from £31,187 (in its first CIO financial period of November 2021 - March 2023) to £60,190 in 2023/24, enabling the charity to hold more events and activities in 2024/25.
- The charity bolstered its capacity by appointing former trustee, Jan Garrill as Associate Director in July 2023 and appointed its first salaried Coordinator in March 2024.

PROGRAMME OF ACTIVITY

Events & learning sessions

During 2023/24 Yorkshire Funders ran a total of 15 events and sessions (up from 12 in 2022/23) which all combined learning, networking and continuing professional development. These fell into five categories and each session was developed based on feedback from members, as well as ideas and experiences from Yorkshire Funders' trustees and consultants who all work for and/or are on the board of a grantmaking organisation. Many events were free for members and a carefully thought through pricing structure was set up for each in person event (where venue hire and catering costs are generally incurred), having member and non-member ticket options available on Eventbrite.

1. Online Workshop

Smaller, two hour Zoom sessions which are typically member-led, where participants wrestle with practical actions to improve their grantmaking practice and are a safe space with lots of time for group discussion.

2. Online Forum

Larger, two hour Zoom sessions where experts from leading practitioners are brought in and there is more information and analysis presented to reflect on, along with a break-out session in smaller groups with peers.

3. In person Training Workshop

Three-five hour, in-depth training sessions run by an expert in the field, supported by Yorkshire Funders' team, with lots of peer discussion and learning.

4. In Person Forum & Annual Conference

June and November events held at a charitable venue with expert speakers and plenty of time for networking, as well as workshops at the Conference.

5. Member Network Meeting

Member network meetings were a new development for 2024 and enabled different types of grantmakers and those interested in a particular way of working to come together with their peers.

PROGRAMME OF ACTIVITY

An online feedback survey was sent to all participants after every in person training workshop and the November and June in person events. Presentations, useful resources and in some cases, a summary of the learnings from an event were posted on the Yorkshire Funders' website

<https://www.yorkshirefunders.org.uk/resources/resources-from-events/>

27th April

Aligned Reporting online workshop, Zoom, 25 attendees

Led by IVAR's Founder/Director, Ben Cairns and Yorkshire Funders' Carla Marshall who led on the Yorkshire Common Application Form, this session explored IVAR's six principles to support better reporting and if there was an appetite to develop a Yorkshire Common Reporting Form (YCRF).

24th May

Safeguarding for Funders training workshop, Leeds, 9 attendees

Led by Voluntary Action Leeds and Leeds Community Foundation, they talked participants through all the safeguarding policies and processes which funders should be looking for in applicants, as well as considerations for funders' internal operations.

21st June

Annual Conference – New Ways of Thinking About Philanthropy, Leeds, 89 attendees

Held at Leeds Playhouse with key note speakers Rhodri Davies, Pears Foundation & University of Kent philanthropy expert and Safina Ahmad, Director at John Ellerman Foundation, along with a Yorkshire Philanthropy Panel and six afternoon workshops.

16th August

Giving Useful Feedback online workshop, Zoom, 22 attendees

Led by Yorkshire Funders' Tim Cutts and Jan Garrill, this session gave local funders that are adopting a more 'Open and Trusting' approach to their grantmaking and communications, and those who want to work in this way, the opportunity to share insights on this subject and learn from each other

PROGRAMME OF ACTIVITY

27th September

Funding Non-Charities: Being a More Inclusive Funder, Zoom, 40 attendees

Speakers were Andrew Croft, Director of Special Projects and board member of Social Enterprise UK, Steve Abson, Regional Development Manager at Coalfields Regeneration Trust, Gill Newman, Clerk to the Trustees of The Talbot Trusts and Daniel Lewis from Wrigleys Solicitors.

11th October

Be a Better Grant Assessor training workshop, Leeds, 12 attendees

Rob Billson, Community Foundation for Calderdale's Grants Manager and an experienced training consultant ran this popular training workshop which is for employees and trustees who are new to grant assessing as well as those who are looking for a refresher.

25th October

Open & Trusting Local Authorities with IVAR, Leeds, 14 attendees

Yorkshire Funders joined forces with IVAR to drive forward a co-designed Open & Trusting grantmaking movement within local authorities. The intelligence from this gathering was combined with IVAR's learnings from the London Funders and Scottish Funders' cohorts.

23rd November

Transform Your Organisation's Approach to DEI Forum, Bradford, 35 attendees

Speakers were Danielle Walker Palmour, founding Director of York-based Friends Provident Foundation, Penny Wilson – CEO, Getting On Board and Mohammed Kamran – Chief Executive and Co-Founder Impact Hub Bradford, along with panelists for a session on how can funding organisations improve their approach to equity?

6th December & 9th January

Be a Better Grant Assessor training workshop, Sheffield & Leeds, 28 attendees

Due to the popularity of the October workshop, Yorkshire Funders held two more sessions in 2023/24 and still had a waiting list of 20 for 2024/25.

PROGRAMME OF ACTIVITY

18th January

State of the Sector online forum, Zoom, 43 attendees

Speakers were Sarah Vibert, CEO of NCVO who shared what 2024 might look like for civil society and funders in Yorkshire, Jack Larkham, Senior Research & Policy Analyst at Pro Bono Economics and Nicky Ruddick, Chair of FAWN.

8th February

Aligned Working network, Zoom, 9 attendees

This network stemmed from the Yorkshire Common Application Form Task Force and the Aligned Reporting online forum held in 2023. The group is led by Yorkshire Funders' Kath Lindley and Carla Marshall and the first meeting focused on updates to the YCAF, 360Giving and the idea of developing common grant classification categories.

28th February

Trusts & Foundations Trustees network, York, 35 attendees

This first network meeting was held at The Principal Hotel in York and was kindly sponsored by McInroy & Wood discretionary investment managers. Speakers were Jo Ropner, Lord Lieutenant of North Yorkshire and chair of Rank Foundation Grants Committee, Jane Hustwit, trustee of the Association of Chairs and Liz Wild, director of McInroy & Wood.

5th March

Understanding Applicants' Finances training workshop, Leeds, 16 participants

Due to popular demand for this training in 2022/23 and excellent feedback on WYCAS (West Yorkshire Community Accounting Service) who led the workshop, Yorkshire Funders ran this again.

21st March

Duties of a Trustees online workshop, Zoom, 16 attendees

Daniel Lewis from Wrigleys hosted this workshop which covered different charity structures and what it means to be a charity, the role of a trustee, trustee duties, decision making and grantmaking and conflicts of interest and serious incident reporting.



NEWS & COMMUNICATIONS

Monthly Sector News Update

Yorkshire Funders researched, wrote and distributed a monthly e-newsletter to all members and the full Yorkshire Funders' database via Mailchimp. Each newsletter contained information and news stories from influential third sector organisations including NCVO, Pro Bono Economics, IVAR, NPC, Joseph Rowntree Foundation, Centre for Social Justice and ACF. The newsletter also featured job adverts for trustees and employees at local grantmaking organisations.

www.yorkshirefunders.org.uk

The website was updated at least every month, with a key news story featured on the home page and the events page being regularly refreshed. The Resources From Events page continued to provide website visitors with a mine of information from all the Yorkshire Funders' events and learning sessions.

LinkedIn

The charity increased the number of posts on Yorkshire Funders' LinkedIn page and this will be an area for development in 2024/25.



PARTNERSHIPS & COLLABORATION

Corporate partners

The charity were incredibly grateful for CCLA and Wrigleys Solicitors' support in 2023/24. Both companies provided vital financial support and Wrigleys also provided its board room for training events as well as speaking at a number of events. They were promoted to members and non-members as much as possible on the website, in newsletters, at events and via event promo emails. Yorkshire Funders' Jan Garrill also established strong relationships with the Yorkshire offices of the investment management firms, McInroy & Wood and Quilter Cheviot who supported two events through sponsorship and provided a training room.

Yorkshire Common Application Form (YCAF)

Yorkshire Funders continued to promote the adoption of the YCAF and by March 2024 had 10 local grantmaking using the application form. In November 2023, Yorkshire Funders' Carla Marshall did an interview with the ACF's Funders Collaborative Hub sharing how the YCAF initiative came about and was developed.

Local Funders Forums & FAWN (Funding Advice Workers Network)

Yorkshire Funders' trustees and consultants continued to attend the South Yorkshire and Wakefield Funders Forums, learning from these groups and sharing information. The Consultant Coordinator maintained regular contact with the FAWN Secretary and Chair, ensuring they could share intelligence at events and in the newsletter.

The logo features a yellow background with a teal diagonal stripe on the left. The text 'Yorkshire Funders Member' is displayed in a bold, sans-serif font. 'Yorkshire' and 'Funders' are in dark blue, while 'Member' is in teal.

Yorkshire Funders Member

Membership scheme

During April 2023 - March 2024, the Yorkshire Funders team continued to work hard to build up funds and ensure sustainability for the long term. Having officially launched the membership scheme in March 2023, the members and funds started coming through strongly during April and May, reaching a total of 66 members by March 2024. Grantmakers from Cumbria and Lincolnshire also became members as they had heard such good things about Yorkshire Funders and didn't have a similar network in their region. The charity's investment in a bespoke Not-for-Profit Salesforce database proved to be a success and enabled the members' information to be safely stored and utilised.

Funder financial support

After 30 years of staffing and resource support from the Sir George Martin Trust, the Yorkshire Funders' team approached a handful of other long term attendees of Yorkshire Funders' events who were particularly supportive of the charity's work to see if they would become a Core Supporter and give £5,000 to enable the charity to appoint and fund its first member of staff (Carla Marshall is a Consultant Coordinator), as well as funding Jan Garrill, former Yorkshire Funders' trustee as the new Associate Director. It is so fantastic that The BRELMS Trust, R.E. Chadwick Charitable Trust and the Sir George Martin Trust all gave their support which ensured the charity was in a very strong financial position by the end of 2023/24.

MEMBER FEEDBACK

"Yorkshire Funders offers a great range of information and support for both boards and funding officers. The accessibility of the online workshops and forums makes it easy to keep abreast of research and good practice, both within Yorkshire and on a national level."

"It is a great opportunity to network with peers and to keep up to date with a range of initiatives."

"The conference was excellent and the online workshops have given great insight and helps with a wider perspective of thinking. This insight along with the opportunities of networking with others provide excellent value for money."

"Yorkshire Funders is a great network, full of interesting organisations - there is always plenty to learn and share"

"As grant funding is a new career path for me, it's been a fantastic way to network with people and share best practice."

"Events always have excellent speakers and have a great balance of being professional whilst also creating a close and supportive culture/environment to be part of. The regional element feels so important. The fact that you are not a national and skewed by London centric thinking is tangible and really important."

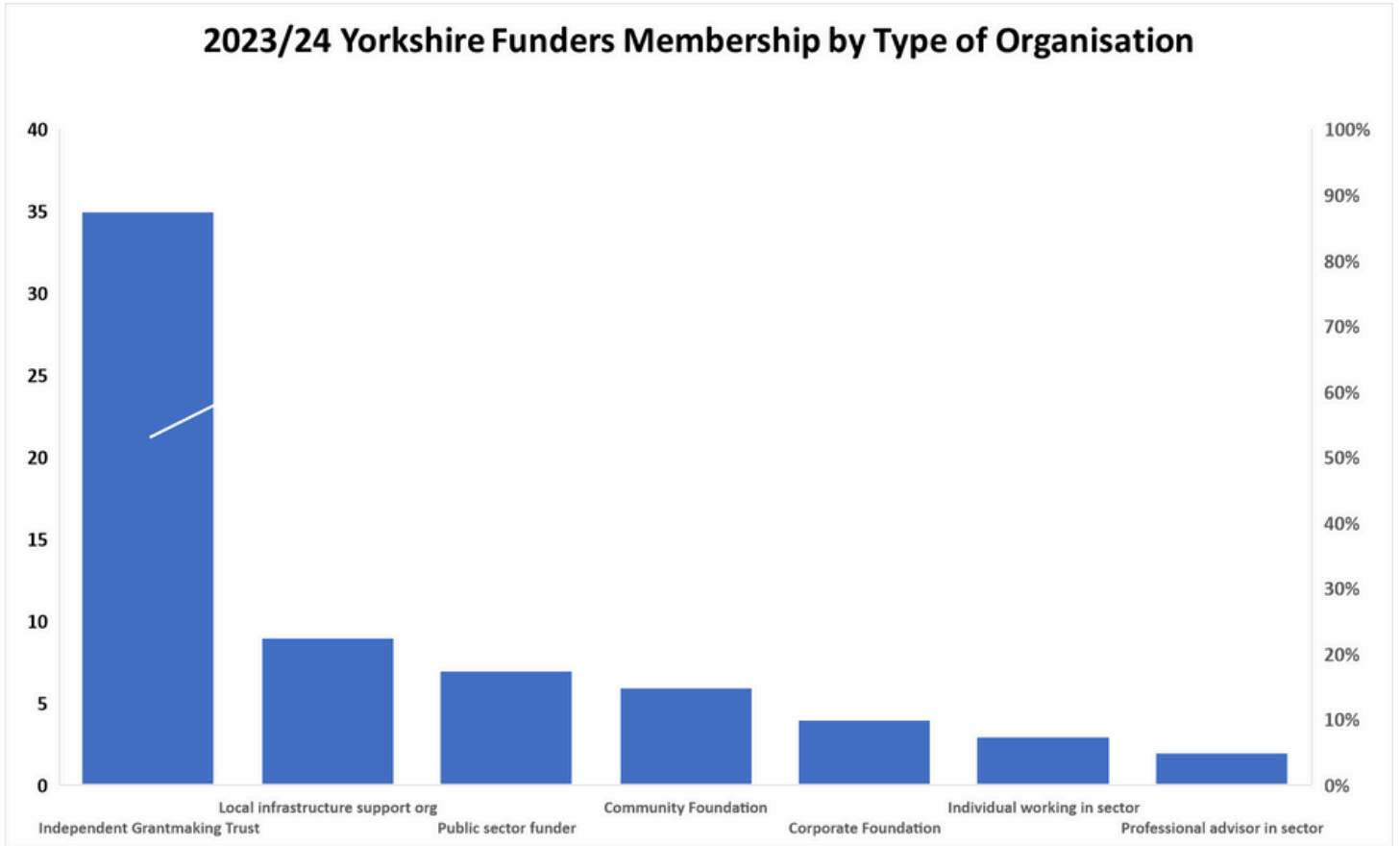
"Yorkshire Funders bring together peers in a productive way. Were the organisation not around, it would be far harder to connect, discover and learn."

"Our organisation has found in person training to be really beneficial and very competitively priced. As well as the content of the training, the value of being trained with peers where you can make connections that are useful in day to day work is a strong selling point."

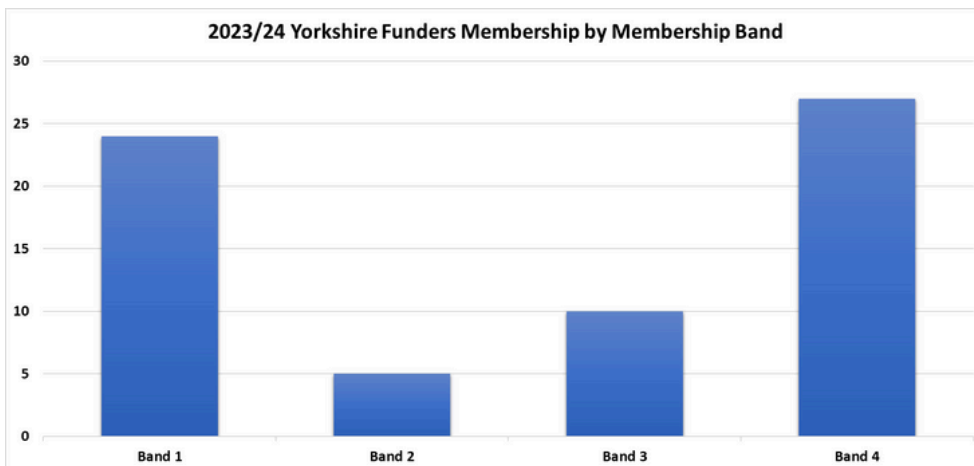
"It offers a fantastic way to connect with other like minded organisations, right across the Yorkshire and Humber region. The quality of the service is amazing, you always feel valued. We are so lucky to be part of Yorkshire Funders!"

2023/24 MEMBER OVERVIEW

2023/24 Yorkshire Funders Membership by Type of Organisation



2023/24 Yorkshire Funders Membership by Membership Band



Band Level	Grant expenditure	Annual Membership Amount
1	£0 - £100,000	£90
2	£101,000 - £250,000	£150
3	£251,000 - £500,000	£250
4	£501,000+	£350



FUTURE AHEAD

PLANS FOR THE FUTURE

Still less than three years into being a fully fledged charity, Yorkshire Funders has achieved a lot, but the team know from members' feedback and partner liaison that there is still so much more to do and many areas for development. With the successful establishment of the membership scheme, expansion of the staff and trustee team, along with growth in the schedule of events and learning sessions, 2023/24 was a year of solidification.

For 2024/25 the focus will be on increasing the number of events and training, as this is what members say they want most, whilst developing Yorkshire Funders' resources and research offering. The charity will also continue to provide more opportunities for different types of grantmakers who have common ways of working to convene, and work to ensure that every member, from the very smallest, right up to large national funders giving in Yorkshire feel that being a Yorkshire Funders' member is valuable for their team, their organisation and their grant recipients. We also want to ensure we can demonstrate our impact on local frontline charities and groups.

The charity will continue to work hard to ensure a diverse and steady income stream in order to maintain staffing levels and ensure quality events and learning sessions. Any surplus from 2023/24 funds will be carried over to go towards staffing and running costs.

GOVERNANCE & MANAGEMENT

Trustees' role

The charity trustees manage the affairs of the organisation and may for that purpose exercise all the powers of the charity. It is the duty of each charity trustee:

- to exercise his or her powers and to perform his or her functions as a trustee of the charity in the way he or she decides in good faith would be most likely to further the purposes of the charity.
- to exercise, in the performance of those functions, such care and skill as is reasonable in the circumstances having regard in particular to i) any special knowledge or experience that he or she has or holds himself or herself out as having; and (ii) if he or she acts as a charity trustee of the organisation in the course of a business or profession, to any special knowledge or experience that it is reasonable to expect of a person acting in the course of that kind of business or profession.

The Yorkshire Funders' trustees are jointly responsible for the overall governance and strategic direction of the charity, its financial health, the integrity of its activities and ensuring the organisation is run in accordance with legal and regulatory guidelines.

Statutory duties of a charity trustee

- To ensure that the charity complies with its governing document, charity law, company law and any other relevant legislation or regulation
- To ensure the charity pursues its objects as defined in its governing document
- To contribute actively to the board of trustees' role of giving firm strategic direction to the organisation, setting overall policy, defining goals, setting targets and evaluating performance against agreed targets
- To safeguard the good name and values of the charity
- To ensure the effective and efficient administration of the charity
- To ensure the financial stability of the charity
- To protect and manage the property of the charity and the charity's funds
- To follow proper and formal arrangements for the appointment, supervision, support, appraisal and remuneration of the Coordinator and other consultants

GOVERNANCE & MANAGEMENT

Role of a Yorkshire Funders' trustee

- Act reasonably in decision making and leadership of the organisation
- Ensure the proper management and administration of the charity
- Manage risks with a considered, proportionate and balanced approach
- Work with fellow trustees, the Coordinator and consultants to shape, drive and monitor the charity's strategy and outcomes
- Prepare for and participate fully in board meetings
- Prepare for and participate in the organisation's events as often as possible
- Support the Coordinator and other consultants, reviewing all information they provide to the trustees in a timely manner
- If and when required, carry out agreed activity duties in a timely and professional manner
- Approval of Annual Accounts
- Succession planning for the board to ensure there is an appropriate balance of skills and experience
- Approval of appointments to the board and taking part in annual reviews of the board's effectiveness
- The role is unpaid, however reasonable travel expenses are paid by the charity (mileage allowance payment rate is 45p a mile as advised by the government)
- Approval of Annual Accounts
- Succession planning for the board to ensure there is an appropriate balance of skills and experience
- Approval of appointments to the board and taking part in annual reviews of the board's effectiveness
- The role is unpaid, however reasonable travel expenses are paid by the charity (mileage allowance payment rate is 45p a mile as advised by the government).

GOVERNANCE & MANAGEMENT

Trustee Terms

- The members or the charity trustees may at any time decide to appoint a new charity trustee, whether in place of a charity trustee who has retired or been removed in accordance with clause [15] of the organisation's Constitution, or as an additional charity trustee, provided that the limit does not exceed 12.
- Any person who retires as a charity trustee by rotation or by giving notice to the CIO is eligible for reappointment. A charity trustee who has served for three consecutive terms may not be reappointed for a fourth consecutive term but may be reappointed after an interval of at least one year.
- Trustee terms are three years.

Meetings

Board meetings are usually held four times a year during a weekday at a venue in Yorkshire. This will include the annual AGM. A couple of additional Zoom meetings may also need to be held in between the in-person board meetings. The trustees are also encouraged (when possible) to take part in the Yorkshire Funders' online and in person events, contribute ideas to the programme of activity, provide new member contacts and when required, complete agreed areas of work, specific to their skill set, e.g. social media posts, charity policies, etc.

Commitment to Equality, Diversity and Inclusion (EDI)

Yorkshire Funders is committed to the organisation and its trustee board reflecting the diversity of Yorkshire, the people who live here and the communities our members fund. As the charity develops, it is important that the trustee board is made up of a range of different people which reflect its members and the Yorkshire region.

Yorkshire Funders will work to ensure that every individual on the trustee board and all consultants have equal opportunities by being conscious of and actively challenging bias or prejudice, to make sure no one is treated less favourably because of who they are or what makes them different from other people.

GOVERNANCE & MANAGEMENT

We recognise we are all different in many ways and trustees and consultants with differing identities, backgrounds and experiences should all have equitable access to resources and decision-making at Yorkshire Funders. We are also proactive to make sure people of different backgrounds, experiences and identities feel welcomed, respected and fully able to participate and we aim to not only create a diverse environment, but also to making sure that a culture exists where individuals can be their full selves.

Recruitment, Induction and Training of Trustees

The Board keeps the skill requirements for the Trustee Body under review with the consultants. Recruitment of new trustees is promoted amongst the Yorkshire Funders' membership and dialogue with interested parties is overseen by the Coordinator and Associate Director. When an individual expresses an interest in becoming a trustee, a meeting is held with the trustees, Associate Director and the Coordinator. If the board agrees, the candidate will be invited to attend a Yorkshire Funders' board meeting and if the candidate would like to join the board the appointment will be made. The Associate Director or Coordinator ensures that each new trustee is provided with the Trustee Guide, the Charity Commission's Essential Trustee document and will provide telephone, Zoom and in-person support as required. Taking part in Yorkshire Funders' events and training sessions ensures ongoing training and professional development for each trustee.

PUBLIC BENEFIT STATEMENT

The Directors of the CIO have considered the general guidance on public benefit issued by the Charity Commission in carrying out its objectives and activities and in delivering public benefit to the many institutions provided with financial and general help and are satisfied that the objectives fall under the provisions of the Charities Act 2011.

FINANCIAL REVIEW

Reserves Policy

The trustees agreed that the charity should generally aim for three to six months in reserves. However, in order to be able to appoint the charity's first contracted employee in March 2024 and have sufficient funds to pay Yorkshire Funders' Associate Director an increased number of hours a week during 2024/25, the charity worked hard to build up its reserves to above six months. The reserves will all be allocated to salary and consultancy costs for 2024/25 and beyond to ensure the long term sustainability of the charity and to be able to deliver more events and activities for members.

Membership fees

The Membership fees for 2023/24 are significantly higher than the previous year (£23,147 compared to £4,570) due to the fact that the accounts are not currently done on an accrual basis and there were fees for 2022/23 and 2023/24 within this total figure.

Summary of fund balances at 31st March 2024:

Unrestricted:	£33,755
Restricted:	£12,758

Commitments

The trustees had made no commitments to future capital purchases, nor given any guarantees, at the balance sheet date.

Approved by the Board of Trustees on 23rd October 2024 and signed on their behalf by:



Tim Cutts
Chair

STATEMENT OF TRUSTEES RESPONSIBILITIES

The trustees of Yorkshire Funders are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England & Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping sufficient accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.



Receipts and payments accounts

CC16a

For the period from	01.04.2023	To	31.03.2024
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations	2,500	-	-	2,500	2,782
Core supporter fees	16,200	-	-	16,200	8,000
Grants	-	12,758	-	12,758	10,000
Membership fees	23,147	-	-	23,147	4,570
Income from events	5,585	-	-	5,585	5,835
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	47,432	12,758	-	60,190	31,187
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	47,432	12,758	-	60,190	31,187
A3 Payments					
IT costs	1,615	-	-	1,615	2,460
Insurance	388	-	-	388	554
Travel	-	-	-	-	206
Event costs	6,545	-	-	6,545	5,486
Administrator/co-ordinator fees	8,332	-	-	8,332	5,000
Consultancy fees	6,086	2,000	-	8,086	4,125
Bank charges	125	-	-	125	48
Trustee meeting costs	58	-	-	58	58
Postage and stationery	220	-	-	220	-
Accountancy fees	480	-	-	480	-
Recruitment advertising	99	-	-	99	-
Other costs	80	-	-	80	-
Sub total	24,028	2,000	-	26,028	17,937
A4 Asset and investment purchases, (see table)					
Assets for charity own use	899	-	-	899	-
	-	-	-	-	-
Sub total	899	-	-	899	-
Total payments	24,927	2,000	-	26,927	17,937
Net of receipts/(payments)	22,505	10,758	-	33,263	13,250
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	11,250	2,000	-	13,250	-
Cash funds this year end	33,755	12,758	-	46,513	13,250

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash at bank	33,755	12,758	-
		-	-	-
		-	-	-
	Total cash funds	33,755	12,758	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
	Laptop	475	-	-
	Monitor	75	-	-
	Office desk	199	-	-
	Chair	150	-	-
			-	-
B5 Liabilities	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	
	PTCuths	PETER TIMOTHY CUTHS	23/10/24	

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
YORKSHIRE FUNDERS
FOR THE PERIOD ENDED 31 MARCH 2024**

I report to the charity trustees on my examination of the accounts of Yorkshire Funders (the charity) for the period ended 31 March 2024.

Responsibilities and basis of report

As the charity'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 charity'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.

Independent examiner's statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

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

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Aman Hayer FCA
Wheawill & Sudworth Limited
Chartered Accountants
35 Westgate
Huddersfield
HD1 1 PA

23 October 2024



CHARITY COMMISSION
FOR ENGLAND AND WALES

Yorkshire Funders

1196519

Receipts and payments accounts

CC16a

For the period from	01.04.2023	To	31.03.2024
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations	2,500	-	-	2,500	2,782
Core supporter fees	16,200	-	-	16,200	8,000
Grants	-	12,758	-	12,758	10,000
Membership fees	23,147	-	-	23,147	4,570
Income from events	5,585	-	-	5,585	5,835
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	47,432	12,758	-	60,190	31,187
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	47,432	12,758	-	60,190	31,187
A3 Payments					
IT costs	1,615	-	-	1,615	2,460
Insurance	388	-	-	388	554
Travel	-	-	-	-	206
Event costs	6,545	-	-	6,545	5,486
Administrator/co-ordinator fees	8,332	-	-	8,332	5,000
Consultancy fees	6,086	2,000	-	8,086	4,125
Bank charges	125	-	-	125	48
Trustee meeting costs	58	-	-	58	58
Postage and stationery	220	-	-	220	-
Accountancy fees	480	-	-	480	-
Recruitment advertising	99	-	-	99	-
Other costs	80	-	-	80	-
Sub total	24,028	2,000	-	26,028	17,937
A4 Asset and investment purchases. (see table)					
Assets for charity own use	899	-	-	899	-
	-	-	-	-	-
Sub total	899	-	-	899	-
Total payments	24,927	2,000	-	26,927	17,937
Net of receipts/(payments)	22,505	10,758	-	33,263	13,250
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	11,250	2,000	-	13,250	-
Cash funds this year end	33,755	12,758	-	46,513	13,250

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash at bank	33,755	12,758	-
		-	-	-
		-	-	-
	Total cash funds	33,755	12,758	-

(agree balances with receipts and payments account(s))

	Details	OK Unrestricted funds to nearest £	OK Restricted funds to nearest £	OK Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

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

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use	Laptop	475	-	-
	Monitor	75	-	-
	Office desk	199	-	-
	Chair	150	-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
<i>P.T. Cotts</i>	PETER TIMOTHY COTTS	23/10/24

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
YORKSHIRE FUNDERS
FOR THE PERIOD ENDED 31 MARCH 2024**

I report to the charity trustees on my examination of the accounts of Yorkshire Funders (the charity) for the period ended 31 March 2024.

Responsibilities and basis of report

As the charity'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 charity'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.

Independent examiner's statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

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

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



Aman Hayer FCA
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		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

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

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
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			-	-
			-	-
			-	-
			-	-

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

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Aman Hayer FCA
Wheawill & Sudworth Limited
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Huddersfield
HD1 1 PA

23 October 2024

YORKSHIRE FUNDERS

England & Wales - Charity number 1196519

Accounts

Yorkshire Funders Annual Report & Financial Statements

For the period ended

31 March 2023

Charitable Incorporated Organisation
Registration Number: 1196519

Yorkshire Funders Chair Introduction

I am pleased to be introducing the first Trustees' Annual Report for Yorkshire Funders CIO. The charity was registered with the Charity Commission on 11th November 2021, which was a major milestone for the organisation due to the fact that for almost 30 years, Yorkshire Funders – under its previous names, the Yorkshire Funders' Forum and before that the Yorkshire Grant Makers' Forum – was an informal voluntary group which continued for so long thanks to a highly committed group of funder volunteers and the Sir George Martin Trust who provided administrative support to deliver the networking and learning events for local funders.

Thanks to the continued support of the volunteer steering committee (who became the founding Yorkshire Funders' trustees), 40 locally-based funding organisations who gave annual contributions in 2022, the charity's first grant from the National Lottery Community Fund's Awards for All, and Carla Marshall and David Warner who carried out the day-to-day work as consultants, the first 16 months of Yorkshire Funders' work got off to a flying start.

Tim Cutts
Chair

Yorkshire Funders

Legal and Administration Information

Trustees

Peter Timothy Cutts	Chair	Appointed 21 st November 2021
Jan Garrill	Trustee	Appointed 21 st November 2021
Stephen Robinson	Trustee	Appointed 21 st November 2021
John Ward	Trustee	Appointed 21 st November 2021 Resigned 1 st July 2022
Bruce Warnes	Trustee	Appointed 7 th February 2023

Registered Office

Harlig House
Skipton Road
Ilkley
LS29 9RP

Auditors

Wheawill & Sudworth
35 Westgate
Huddersfield
HD1 1PB

Bankers

HSBC
8 Canada Square
London
E14 5HQ

Yorkshire Funders

Objectives and Activities

Charitable Purpose

The objects of Yorkshire Funders CIO are:

The promotion of the effective use of resources for charitable purposes by charitable and non-charitable bodies in Yorkshire and the Humber for the benefit of the public by:

- PROVIDING ADVICE AND INFORMATION PARTICULARLY ON FUNDING AND SOCIAL INVESTMENT;
- PROMOTING OPPORTUNITIES TO FACILITATE CO-OPERATION AND COLLABORATION;
- PROVIDING RESOURCES AND FUNDING;
- PROVIDING TRAINING AND INFORMATION AND FACILITATING THE EXCHANGE OF INFORMATION, KNOWLEDGE AND EXPERIENCE, AND;
- ENABLING FUNDING ORGANISATIONS TO PROVIDE SUPPORT AND FUNDING MORE EFFECTIVELY.

Aims & Public Benefit

Yorkshire Funders provides opportunities for local funding organisations of all sizes and from all sectors to think, share, learn and act together in order to be more effective and boost their impact on Yorkshire people and places.

Activities

During November 2021 – March 2023, Yorkshire Funders delivered the following activities, much of it stemming from feedback from local funders on issues and subjects they wanted to learn more about and discuss with their peers:

Networking & Learning Events – Virtual (using Zoom) & In-person

- 2nd December 2021** **Online Forum: Poverty – Prevention or Crisis?** – Speakers featured were JRF, Lankelly Chase, Leeds Poverty Truth Commission, Flourishing Families Leeds and Chair of Bradford VCS Alliance.
- 11th January 2022** **Online Workshop: The Importance of Using the 360Giving Standard** – Led by Katharine Duerden of 360Giving, with David Warner demonstrating the 2021 Yorkshire & Humber Funding Ecology Data Dashboard.
- 23rd March 2022** **Online Forum: Macro vs. Micro – Who’s Been Hit the Hardest & Does Size Matter?** – Speakers featured were NCVO and Professor Tony Chapman from Durham University, and there was a break-out session to discuss the subject.
- 24th May 2022** **Online Workshop: Yorkshire Common Application Form** – Led by the YCAF Task Force, with the aim of educating local funders about the initiative, how and why they should get involved.

- 15th June 2022** **Annual Conference: Smarter Giving in the ‘New Normal’** – Held at St. Saviourgate, York with key note speakers Paul Streets OBE, Chief Executive, Lloyds Bank Foundation and Danielle Walker Palmour, Director, Friends Provident Foundation. The day also featured a local funder panel and six afternoon workshops.
- 2nd August 2022** **Online Workshop: Reviewing Your Grant-Making** – Led by David Warner and featuring Two Ridings Community Foundation, Leeds Building Society Foundation and Joseph Rank Benevolent Fund who shared their recent journeys of change.
- 22nd Sept. 2022** **Online Forum: Latest Learnings from the Funding Sector** – Speakers featured were Pro Bono Economics, IVAR and the National Lottery Community Fund Strategic Programmes team, and there was a break-out session to discuss the intelligence shared.
- 24th Nov. 2022** **In-person Forum: How can we Help Young People Flourish?** – Held at CAPA College, Wakefield with speakers from Children England, Youth Endowment Fund, CATCH Leeds, The Youth Association and Sidewalk-Scarborough Youth Project.
- 19th January 2023** **Online Forum: State of the Sector** – Speakers featured were NCVO, and local infrastructure support organisations CABAD, Forum and Community First Yorkshire, along with FAWN (Funding Advice Workers Network). There was a break-out session to discuss the actions which funders and funding advisors agreed upon at the 2022 Conference.
- 29th March 2023** **Online Forum: Does Impact Matter?** – Speakers featured were NPC, Children in Need, Shears Foundation and frontline charity SELFA. There was a break-out session to discuss outcomes, impact, evaluation and learning.

Collaborative Initiatives

Yorkshire Common Application Form (YCAF)

During 2022, Yorkshire Funders continued leading on the YCAF initiative which was started in July 2021, aiming to make the grant application process for grant seekers easier and faster by encouraging local funders of all sizes and types to adopt the YCAF so that over time grant seekers will find that they are being asked exactly the same questions, in the same format.

Yorkshire Funders worked closely with its key partner in this initiative, JRF, who chaired the YCAF Task Force and carried out a significant amount of the work to make the YCAF become a reality. Carla Marshall, the Coordinator of Yorkshire Funders acted as the Secretary of the Task Force and organised six Task Force meetings during November 2021 – March 2023, along with finalising the online and Word YCAF, the YCAF Initiative Document and the Grant Applications Guideline Template. Yorkshire Funders launched the YCAF for use in July 2022 and regularly promoted the adoption of the initiative in the monthly e-newsletter.

Northern Funding Retreat

Yorkshire Funders worked closely with the informal group, the Friday Funders – who started meeting during Covid – to develop and host the first Northern Funding Retreat which was held at JRF's offices on the 6th October 2022. The group included Yorkshire Funders' Jan Garrill, David Warner and Carla Marshall, along with Kate Hainsworth, CEO of Leeds Community Foundation and Joe Dobson, Head of the Yorkshire & Humber Region at the National Lottery Community Fund.

The CEOs/Directors attended from the following national funders to discuss creating equity in Yorkshire, challenges and opportunities:

Paul Hamlyn Foundation
Friends Provident
Henry Smith
JRF
London Funders
Lloyds Bank Foundation
Lankelly Chase Foundation

Following a successful session, Yorkshire Funders was in regular liaison with each funder and following feedback, developed a Yorkshire Funders' research/mapping initiative.

Taking Part in Local Funders Forums

Yorkshire Funders regularly joined the Bradford, South Yorkshire and Wakefield Funders Forums to share Yorkshire Funders' news and ensure a close connection with these important local Funders Forums.

Assisting & Learning from Other Regional Funders Forums

Yorkshire Funders took part in a series of Zoom meetings with Funders Forums in Manchester, Northern Ireland, Cumbria, West Midlands and Bedfordshire as they had heard about the YCAF and Yorkshire Funders' work and wanted to learn more about how to develop their Forum. Yorkshire Funders also learnt from them about their funding models and activities.

FAWN (Funding Advice Workers Network)

Yorkshire Funders regularly liaised with the Secretary of FAWN to ensure that funding advisors at local infrastructure support organisations were able to share their news and information with funders and vice versa. The organisation also partnered with FAWN to run sessions at the 2022 Conference and January 2023 Online Forum.

Funder Training

Yorkshire Funders teamed up with the well respected accountancy charity WYCAS (West Yorkshire Community Accounting Service) to create and deliver its first bespoke funder training session focused on Understanding Applicants' Finance. Due to its popularity with local funders, two three hour, in-person workshops were held in central Leeds for 12 people on the 24th January 2022 and the 15th March 2022. Yorkshire Funders also started work preparing for a May Safeguarding for Funders training session.

Yorkshire Funders Research

Before Yorkshire Funders become a CIO, the team had worked with the National Lottery Community Fund and Rocket Science to help create the Yorkshire & Humber Funding Ecology Reports in 2019 and 2021. Due to a limited budget and resources for 2022/23, the Yorkshire Funders trustees decided that the next Funding Ecology report should be a focus area for 2023/2024, and be a larger, more in-depth research project.

At the Northern Funding Retreat, many of the national funders said that as Yorkshire is so large and varied they don't really know the 'story' of the different parts of Yorkshire and this can be a barrier to giving significant levels of funds. As a result, in the first quarter of 2023, Yorkshire Funders worked with Knaresborough-based non-profit organisation Better Connect to create two 'data stories' as a pilot project. The two geographical areas were Leeds and East Riding and these resources will be utilised and promoted later in 2023.

Sector News & Communications

www.yorkshirefunders.org.uk

The Coordinator regularly updated the website with news stories, Yorkshire Funders' events and resources and materials from the events. In summer 2022 a dedicated YCAF page was added featuring details of the initiative and the names of funders who are using the YCAF and are interested in adopting the application form. The Members page was also developed, featuring the funders giving annual contributions for 2022/23.

Yorkshire Funders Monthly News Update

These email updates started during Covid in 2020 and as a number of funders said they found them very useful, Yorkshire Funders developed the emails into regularly monthly News Updates using Mailchimp for design and distribution. As 2022 went on, Yorkshire Funders started being sent more news from local funders to be included which demonstrated the value of the e-newsletter.

Funding & Membership Scheme

During November 2021 – March 2023, the Yorkshire Funders team worked hard to build up funds and ensure sustainability for the longer term. Having been reliant on the good will of the Sir George Martin Trust board for many years – who supported and compensated Carla Marshall, their Trust Manager to be the Coordinator for the Yorkshire Grant Makers' Forum and Yorkshire Funders Forum – the strategy for the 2022/23 financial period was to create multiple income streams which were as follows:

Corporate Support

Yorkshire Funders liaised with national investment management firm, CCLA in January 2022 to secure £3,000, and in January 2023 the team secured £5,000 from CCLA and £5,000 from Yorkshire-based, charity expert, Wrigleys Solicitors.

Funder Grants

Yorkshire Funders applied to the National Lottery Community Fund's Awards for All for £10,000 in March 2022 and secured this grant in June 2022. Yorkshire Funders also began talks with JRF about the possibility of funding for 2023/24 and beyond.

Official Membership Scheme

In May 2020, at the start of the Covid pandemic, the Yorkshire Funders' Forum asked local funders to contribute £30 to support the administrative costs of running the events which all moved online and the creation of the e-newsletter. And then in March 2021 and 2022, this contribution request increased to £50, with almost 40 funders showing their support.

As part of the consultation process of becoming Yorkshire Funders CIO and throughout 2022, the team regularly asked local funder contacts (on an informal, ad hoc basis) how they felt about an official membership scheme with a higher fee and everyone was positive as they could see the significant increase in activity and benefits to them. This led to Yorkshire Funders developing a 2023/24 membership scheme proposition in Autumn 2022 and then holding an Online Focus Group in January 2023 with some key funders of differing sizes to discuss the details. This very useful feedback enabled Yorkshire Funders to fine-tune the proposal and then a survey outlining the details was sent to the full database soon after. Following a very positive response, Yorkshire Funders then officially launched the 2023/24 Membership Scheme in March 2023, with four membership bands based on each funder's previous year of grantmaking.

To ensure the membership data could be managed effectively for many years to come, Yorkshire Funders invested in a CRM system – Not-for-Profit Salesforce, bespoke designed for the charity's needs by grantmaking IT specialist, Issimo.

Event & Training Ticket Sales

Yorkshire Funders continued to charge for all in-person events, but the new income streams meant that the organisation wasn't reliant on making a significant profit from these and kept the prices low.

Achievements and Performance

Achievements

- Yorkshire Funders solidified its position as the leading networking and learning organisation for grantmakers giving in the Yorkshire region.
- During November 2021 – March 2023 the Yorkshire Funders' 12 events and training sessions were attended by over 400 employees and trustees from 70 different funding and infrastructure support organisations (many individuals attended multiple events).
- 10 local funding organisations have adopted or are committed to adopting the Yorkshire Common Application Form (YCAF) in the near future.
- As of the 31st March 2022, 40 funders and infrastructure support organisations had registered to join the Yorkshire Funders 2023/24 Membership Scheme.
- Two corporate supporters, totalling £10,000 in unrestricted funds were secured for 2023/24 and a £10,000 restricted grant from the National Lottery Community Fund's Awards for All.

Feedback from Funders

"I think the work of Yorkshire Funders is invaluable and is such a fantastic resource and network in the region. It gives us a collective voice, adds 'strength in numbers' and gives us all opportunities to benchmark our practices against others, explore new ideas and ways of working, and add impact to our funding programmes."

"Thank you for another great, very fruitful, funders session. Some great discussions and sharing points."

"I thought today's online session was one of the best events we have attended. All the speakers were great and on the point - we came away with lots of ideas to think about. Once again a big thank you for all the hard work you put in organising this."

"Just continue with your excellent work!"

"I just wanted to drop you a line to say thank you so much for organising such a brilliant event last Thursday. It was the best event I've attended in a long time. It was obviously so relevant for us, but just so interesting in general. I honestly left with a bag full of emotions because of the singing, hearing from the young people and their stories and just a buzzing feeling of wanting to improve life for young people in any way we can."

"Please continue to offer high quality briefings which inform and challenge our practice, particularly practical steps and good practice models to improve inclusion in our sector."

"That was one of the best Yorkshire Funders sessions yet! Well done organising that one!"

Plans for the Future

In 2023/24 it is crucial that another consultant joins Carla Marshall to carry out the day-to-day work of the charity as Carla's main job is Trust Manager at the Sir George Martin Trust and the activities at Yorkshire Funders' have increased considerably over the last two years. We are pleased to confirm that in June, our current trustee, Jan Garrill will resign as a Yorkshire Funders' trustee and be employed as a consultant, while David Warner will move from being a consultant to a trustee. Jan will initially focus on developing the funding, strategic and research elements of Yorkshire Funders' work.

Yorkshire Funders will continue to ensure it is constantly getting feedback from its members in order to create a varied programme of events, training and activities which meet their needs, and address the opportunities and challenges that modern grantmakers face today.

Structure, Governance and Management

Charity Name

Yorkshire Funders

Charity Status

Yorkshire Funders is a Charitable Incorporated Organisation registered with the Charity Commission, Charity Registration No. 1196519

Trustees

The charity trustees manage the affairs of the organisation and may for that purpose exercise all the powers of the charity. It is the duty of each charity trustee:

- to exercise his or her powers and to perform his or her functions as a trustee of the charity in the way he or she decides in good faith would be most likely to further the purposes of the charity.
- to exercise, in the performance of those functions, such care and skill as is reasonable in the circumstances having regard in particular to i) any special knowledge or experience that he or she has or holds himself or herself out as having; and (ii) if he or she acts as a charity trustee of the organisation in the course of a business or profession, to any special knowledge or experience that it is reasonable to expect of a person acting in the course of that kind of business or profession.

The Yorkshire Funders trustees are jointly responsible for the overall governance and strategic direction of the charity, its financial health, the integrity of its activities and ensuring the organisation is run in accordance with legal and regulatory guidelines.

Statutory duties of a charity trustee

- To ensure that the charity complies with its governing document, charity law, company law and any other relevant legislation or regulation
- To ensure the charity pursues its objects as defined in its governing document
- To contribute actively to the board of trustees' role of giving firm strategic direction to the organisation, setting overall policy, defining goals, setting targets and evaluating performance against agreed targets
- To safeguard the good name and values of the charity
- To ensure the effective and efficient administration of the charity
- To ensure the financial stability of the charity
- To protect and manage the property of the charity and the charity's funds
- To follow proper and formal arrangements for the appointment, supervision, support, appraisal and remuneration of the Coordinator and other consultants

Role of a Yorkshire Funders' trustee

- Act reasonably in decision making and leadership of the organisation
- Ensure the proper management and administration of the charity
- Manage risks with a considered, proportionate and balanced approach
- Work with fellow trustees, the Coordinator and consultants to shape, drive and monitor the charity's strategy and outcomes

- Prepare for and participate fully in board meetings
- Prepare for and participate in the organisation's events as often as possible
- Support the Coordinator and other consultants, reviewing all information they provide to the trustees in a timely manner
- If and when required, carry out agreed activity duties in a timely and professional manner
- Approval of Annual Accounts
- Succession planning for the board to ensure there is an appropriate balance of skills and experience
- Approval of appointments to the board and taking part in annual reviews of the board's effectiveness
- The role is unpaid, however reasonable travel expenses are paid by the charity (mileage allowance payment rate is 45p a mile as advised by the government)

Trustee Terms

- The members or the charity trustees may at any time decide to appoint a new charity trustee, whether in place of a charity trustee who has retired or been removed in accordance with clause [15] of the organisation's Constitution, or as an additional charity trustee, provided that the limit does not exceed 12.
- Any person who retires as a charity trustee by rotation or by giving notice to the CIO is eligible for reappointment. A charity trustee who has served for three consecutive terms may not be reappointed for a fourth consecutive term but may be reappointed after an interval of at least one year.
- Trustee terms are three years.

Meetings

Board meetings are usually held four times a year during a weekday at a venue in Yorkshire. This will include the annual AGM at the June Conference. A couple of additional Zoom meetings may also need to be held in between the in-person board meetings. The trustees are also encouraged (when possible) to take part in the Yorkshire Funders online and in person events, contribute ideas to the programme of activity, provide new member contacts and when required, complete agreed areas of work, specific to their skill set, e.g. social media posts, charity policies, etc.

Commitment to Equality, Diversity and Inclusion (EDI)

Yorkshire Funders is committed to the organisation and its trustee board reflecting the diversity of Yorkshire, the people who live here and the communities our members fund. As the charity develops, it is important that the trustee board is made up of a range of different people which reflect its members and the Yorkshire region.

Yorkshire Funders will work to ensure that every individual on the trustee board and all consultants have equal opportunities by being conscious of and actively challenging bias or prejudice, to make sure no one is treated less favourably because of who they are or what makes them different from other people. We recognise we are all different in many ways and trustees and consultants with differing identities, backgrounds and experiences should all have equitable access to resources and decision-making at Yorkshire Funders. We are also proactive to make sure people of different backgrounds, experiences and identities feel welcomed, respected and fully able to participate and we aim to not only create a diverse

environment, but also to making sure that a culture exists where individuals can be their full selves.

Recruitment, Induction and Training of Trustees

The Board keeps the skill requirements for the Trustee Body under review with the consultants. Recruitment of new trustees is promoted amongst the Yorkshire Funders' membership and dialogue with interested parties is overseen by the Coordinator. When an individual expresses an interest in becoming a trustee, a meeting is held with the trustees and the Coordinator. If the board agrees, the candidate will be invited to attend a Yorkshire Funders' board meeting and if the candidate would like to join the board the appointment will be made. The Coordinator ensures that each new trustee is provided with the Trustee Guide, the Charity Commission's Essential Trustee document and will provide telephone, Zoom and in-person support as required. Taking part in Yorkshire Funders' events and training sessions ensures ongoing training and professional development for each trustee.

Financial Review

Financial Statements

Reserves Policy

The trustees agreed that the charity should aim for three to six months in reserves.

Summary of fund balances at 31st March 2023:

Unrestricted:	£11,250.00
Restricted:	£ 2,000.00

Commitments

The trustees had made no commitments to future capital purchases, nor given any guarantees, at the balance sheet date.

Approved by the Board of Trustees on 9th June 2023 and signed on their behalf by:



Tim Cutts
Chair

Yorkshire Funders

Statement of Trustees Responsibilities

The trustees of Yorkshire Funders are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England & Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping sufficient accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Yorkshire Funders

1196519

Receipts and payments accounts

CC16a

For the period
from

11.11.2021

To

31.03.2023

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donation	2,782	-	-	2,782	-
Sponsorship	8,000	-	-	8,000	-
Grants	-	10,000	-	10,000	-
Contributions & membership fees	4,570	-	-	4,570	-
Income from events	5,835	-	-	5,835	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	21,187	10,000	-	31,187	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	21,187	10,000	-	31,187	-
A3 Payments					
IT costs	1,085	1,375	-	2,460	-
Insurance	554	-	-	554	-
Travel	206	-	-	206	-
Event costs	5,486	-	-	5,486	-
Administrator/co-ordinator fees	2,500	2,500	-	5,000	-
Consultancy fees	-	4,125	-	4,125	-
Bank charges	48	-	-	48	-
Trustee meeting costs	58	-	-	58	-
	-	-	-	-	-
Sub total	9,937	8,000	-	17,937	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	9,937	8,000	-	17,937	-
Net of receipts/(payments)	11,250	2,000	-	13,250	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	11,250	2,000	-	13,250	-

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash at bank	11,250	2,000	-
		-	-	-
		-	-	-
		-	-	-
	Total cash funds	11,250	2,000	-

(agree balances with receipts and payments account(s))

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

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

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
PTCUTTS	PETER TIMOTHY CUTTS	2/6/23

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
YORKSHIRE FUNDERS
FOR THE PERIOD ENDED 31 MARCH 2023**

I report to the charity trustees on my examination of the accounts of Yorkshire Funders (the charity) for the period ended 31 March 2023.

Responsibilities and basis of report

As the charity'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 charity'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.

Independent examiner's statement

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

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

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



Aman Hayer FCA
Wheawill & Sudworth Limited
Chartered Accountants
35 Westgate
Huddersfield
HD1 1 PA

2 June 2023