

# WOODTON UNITED CHARITIES

England & Wales · Charity number 207531

## Details

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**Status** Registered

**Legal form** Other

**Registered** 1990-04-25

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

## Contact

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**Address** Lilac Cottage  
Triple Plea Road  
Bedingham  
Bungay  
Suffolk  
NR35 2NY

**Phone** 01508482714

**Email** [amandajcalder67@outlook.com](mailto:amandajcalder67@outlook.com)

## Activities

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**Objects:** (1) THE TRUSTEES SHALL APPLY THE INCOME AND CAPITAL OF THE CHARITY APPLICABLE FOR RELIEF IN NEED IN RELIEVING EITHER GENERALLY OR INDIVIDUALLY PERSONS RESIDENT IN THE PARISH OF WOODTON AND OR IN THE SURROUNDING AREAS WHO ARE IN CONDITIONS OF NEED, HARDSHIP OR DISTRESS BY MAKING GRANTS OF MONEY OR PROVIDING OR PAYING FOR ITEMS, SERVICES OR FACILITIES CALCULATED TO REDUCE THE NEED, HARDSHIP OR DISTRESS OF SUCH PERSONS.(2) TO PROMOTE FOR THE BENEFIT OF THE INHABITANTS OF THE PARISH OF WOODTON AND OR IN THE SURROUNDING AREAS THE PROVISION OF FACILITIES FOR RECREATION OR OTHER LEISURE TIME OCCUPATION.(3) TO PROVIDE OR ASSIST IN THE PROVISION OF FACILITIES IN THE INTERESTS OF SOCIAL WELFARE FOR RECREATION OR OTHER LEISURE TIME OCCUPATION.

**Activities:** Woodton United Charities is a trust that provides grants for people living in the village of Woodton in Norfolk (near Bungay), whose current circumstances would allow them to benefit from financial assistance. We are particularly interested in hearing from pensioners, disabled people (or their carers), and young people embarking on an apprenticeship or a course in further/higher education.

## Classification

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- **How:** Makes Grants To Individuals, Makes Grants To Organisations
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives, Disability, The Prevention Or Relief Of Poverty
- **Who:** Children/young People, Elderly/old People, People With Disabilities

## Geography

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- **Area of benefit:** PARISH OF WOODTON AND OR IN THE SURROUNDING AREAS
- Norfolk

## Finances

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Period end	Income	Expenditure	Assets	Employees
2024-12-31	£20,190	£30,012	-	-
2023-12-31	£32,754	£37,067	-	-
2022-12-31	£16,166	£24,441	-	-
2021-12-31	£7,470	£11,421	-	-
2020-12-31	£5,747	£13,799	-	-

## Trustees

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Name	Role	Appointed
<b>Andrew McCrostie</b>	Chair	2018-04-23
Amanda Jane Calder		2024-01-09
Chris Wells		2023-12-11
Ronni Knights		2017-07-22

**WOODTON UNITED CHARITIES**

England & Wales - Charity number 207531

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# Accounts

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**WOODTON UNITED CHARITIES**  
**FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 DECEMBER 2023**

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**Newman & Co**  
**Chartered Accountants**  
**7 Hungate**  
**Beccles**  
**Suffolk**  
**NR34 9TT**

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**WOODTON UNITED CHARITIES**

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**WOODTON UNITED CHARITIES**

**LEGAL AND ADMINISTRATIVE INFORMATION**

**NAME:** WOODTON UNITED CHARITIES

**REGISTERED NUMBER:** 207531

**TRUSTEES:** Mr. I. Butler  
Mr. M. Wickstead  
Mrs. R. Knights  
Mr. M. Beckett  
Mr. A. McCrostie  
Mrs.A. Phillips – resigned 7.11.23  
Mr. G. Boon  
Mr. C. Wells

**REGISTERED OFFICE:** 2 Tensing Street  
Woodton  
Bungay  
Suffolk  
NR35 2NL

**BANKERS:** Barclays`  
Leicester  
LE87 2BB  
CCLA  
HSBC  
Queen Victoria Street  
London  
EC4N 2TR

**ACCOUNTANTS:** Newman & Co  
7 Hungate  
Beccles  
Suffolk  
NR34 9TT

## **WOODTON UNITED CHARITIES**

### **REPORT OF THE TRUSTEES**

#### **COMMITTEE OF MANAGEMENT**

Trustees	- Nominated	- Mr. I. Butler.
	- Co-opted	- Mrs. R. Knights, Mr. M. Beckett, Mr. G. Boon Mr. A. McCrostie, Mrs. A. Calder. Mr. I. Butler, Mr M. Wickstead, Mr C Wells
Chairman		- Mr. I. Butler
Vice Chairman		- Mr. A. McCrostie
Treasurer		- Mrs. R. Knights
Secretary		- A. Calder

#### **STATEMENT OF RESPONSIBILITIES OF THE COMMITTEE**

Charity law requires the Committee of Management to prepare accounts for each financial year which give a true and fair view of the assets and current liabilities of the Charity and of the income and expenditure of the Charity for that period. In preparing those accounts, the Committee are required to:

- select suitable accounting policies and then apply them consistently
- make judgements and estimates that are reasonable and prudent
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the accounts
- prepare the accounts on the going concern basis unless it is inappropriate to presume that the Charity will continue in business

The Charity must cause proper accounting records to be kept and establish and maintain systems of control of its business and records and of inspection and report. The accounting records must show and explain the transactions of the Charity and disclose with reasonable accuracy and promptness the financial position of the Charity at any time. The accounting records and the systems of control and of inspection and report must:

- enable the Committee of Management properly to discharge the duties imposed on them by or under the Charities Act 1993 (including ensuring that the Accounts comply with the Charities Act 1993 and regulations made under it) and their function of direction of the affairs of the Charity; and
- enable the Charity properly to discharge the duties imposed on it or under the Charities Act 1993.

Hence, the Committee of Management is responsible for safeguarding the assets and taking reasonable steps for the prevention and detection of fraud and other irregularities.

#### **PRINCIPAL OBJECTIVES**

The primary objective of Woodton United Charities is to provide relief for those in need within the Parish of Woodton. The Trustees are also committed to continuously reviewing the Charity's assets to ensure they provide the best return for the residents of Woodton, both now and in the future.

## **WOODTON UNITED CHARITIES**

### **REPORT OF THE TRUSTEES**

#### **REVIEW OF THE CHARITY'S ACTIVITIES FOR THE YEAR**

##### **OBJECTIVES AND ACTIVITIES**

The primary objective of Woodton United Charities is to provide relief for those in need within the Parish of Woodton.

The Charities receive income from agricultural land in Geldeston and from various financial investments. The Trustees apply this income for relief of need through activities including:

- Providing financial support to individuals and families in times of hardship and crisis
- Distributing annual grants each Christmas to pensioners, disabled and infirm people, and others on low incomes.
- Allocating grants to young people embarking on apprenticeships or courses in further or higher education
- Providing grants towards the funeral expenses of people who lived in the village
- Providing financial support to Woodton Helpline, a network of volunteers who help local people by providing transport for hospital visits, doctor's appointments, etc.

The Trustees are also committed to continuously reviewing the Charity's assets to ensure they provide the best return for the residents of Woodton, both now and in the future.

##### **HISTORICAL BACKGROUND**

Woodton United Charities was set up in 1910 to combine the following individual charities set up by local benefactors:

- The Charity of Nicholas Wilton, which dates back to 1665
- Thomas Bardwell's Gift, dating from 1719
- The Moyse Charity, dating from 1705

In 1911, these three charities were officially grouped under the collective title of Woodton United Charities.

Woodton United Charities Trust is regulated by a Charity Commission Scheme set up in 1990 and now includes a fourth charity, the Lt Gurden Lee Memorial Charity, which dates from 1917.

##### **STRUCTURE, GOVERNANCE AND MANAGEMENT**

The Charity Commission scheme of 1990 makes provision for five Trustees:

- The Vicar of Woodton, who acts as Ex-officio Trustee
- Two Trustees who are nominated by the Parish Council
- Two Trustees who are co-opted by the other Trustees

This provision was reviewed on 13<sup>th</sup> March 2017, when it was agreed that the number of Trustees should be increased to seven in order to cope with the current workload.

Terms of office are four years for Nominated Trustees and five years for Co-opted Trustee.

The Trustees hold two ordinary meetings a year, plus special meetings as and when required.

## WOODTON UNITED CHARITIES

### REPORT OF THE TRUSTEES

#### **REVIEW OF THE CHARITY'S ACTIVITIES FOR THE YEAR**

The first ordinary meeting of the year is the Annual General Meeting. At this meeting:

- a Chairperson is appointed for the coming year
- the Annual Accounts for the previous year, having been reviewed by the independent examiner, are formally submitted to the Trustees for their approval.

The distribution of annual grants is discussed at the last ordinary meeting of the year, which typically takes place a few weeks before Christmas.

#### **ACHIEVEMENTS AND PERFORMANCE**

Throughout the year, grants were issued for a wide range of good causes (see Financial Review below).

The Trustees continue to work closely with our land agents, Brown & Co, and our solicitors, Leathes Prior, to achieve the best possible return from our land assets for the residents of Woodton.

The results for the year and financial position of the Charity are shown in the annexed financial statements.

During 2023 there were 5 ordinary meetings.

#### **Financial Review**

Total income for 2023 was £32,754 with £6,111 coming from cash dividends, £943 from interest, £42 from Wayleaves, £14,512 as a Grant from South Norfolk District Council, £110 from donations and £11,036 from investments, of which £9,650 were reinvested.

Grants totalling £8,726 were issued during 2023. These included:

- *Education Grants (£500 in total)*
- *Bereavement Grants (£1,000 in total)*
- *Helping hands grants (£4,726 in total)*
- *Grants made for helping with heating costs (£1,150 in total)*
- *Annual grants made to local residents (£1,350 in total)*

In April 2023, the annual insurance premium of £412 was paid for public liability cover on the Charities' land at Geldeston.

In September 2023, a further payment of £380 was made for public liability insurance cover on the Playing field which has now become the Charities' responsibility.

**WOODTON UNITED CHARITIES**

**REPORT OF THE TRUSTEES**

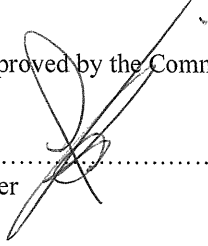
**REVIEW OF THE CHARITY'S ACTIVITIES FOR THE YEAR**

**Reserves Policy**

Sufficient financial reserves are kept readily accessible in order to respond quickly and effectively to crises or other unexpected events affecting village residents. Any additional funds that are not required in the short to medium term are invested for income and growth in the COIF Charities' Investment Fund run by CCLA.

This report was approved by the Committee of Management on .....

(Signed) .....  
Chairman – I. Butler



**WOODTON UNITED CHARITIES**  
**STATEMENT OF FINANCIAL ACTIVITIES**  
**FOR THE YEAR ENDED 31 DECEMBER 2023**

		2023	2022
	Notes	£	£
<b>INCOMING RESOURCES</b>			
Investment Income	2	18,090	16,124
Wayleave		42	42
Donations		110	
Grant from South Norfolk District Council		14,512	
		<u>£32,754</u>	<u>£16,166</u>
		=====	=====
<b>RESOURCES EXPENDED</b>			
Cost of generating funds:			
Direct Charitable Expenditure	3	8,726	10,153
Management and Administration Costs	4	18,691	6,030
Reinvested funds		9,650	8,258
		<u>37,067</u>	<u>24,441</u>
		-----	-----
<b>NET (EXPENDITURE) FOR THE YEAR</b>			
		(4,313)	(8,275)
		-----	-----
Net Movement in Cash Funds		(4,313)	(8,275)
Increase/(Decrease) in Value of Investments	6	21,354	(43,091)
Total Funds at 1 January 2023		387,367	438,733
<b>TOTAL FUNDS AT 31 DECEMBER 2023</b>		<u>£404,408</u>	<u>£387,367</u>
		=====	=====

**WOODTON UNITED CHARITIES**  
**BALANCE SHEET**  
**AS AT DECEMBER 2023**

	Notes	2023		2022	
		£	£	£	£
<b>INVESTMENTS</b>					
COIF shares	5		222,615		203,880
Blackrock Investment	6		215,892		202,345
Nucleus Financial Group	6		150,184		142,377
Changing Room at FC			2,500		2,500
Playing Field			10,260		10,260
			<u>601,451</u>		<u>561,362</u>
 <b>CURRENT ASSETS</b>					
Bank Accounts		14,514		4,764	
Deposit Accounts		11,658		25,721	
		<u>26,172</u>		<u>30,485</u>	
 <b>CURRENT LIABILITIES</b>					
Amounts falling due within one year		600		540	
		<u>600</u>		<u>540</u>	
			25,572		29,885
<b>NET ASSETS</b>			<u>£627,023</u>		<u>£591,247</u>
 <b>REPRESENTED BY:</b>					
<b>CAPITAL FUNDS</b>					
Endowments	5		222,615		203,880
<b>INCOME FUNDS</b>					
			404,408		387,367
			<u>£627,023</u>		<u>£591,247</u>

Approved by the Board of Trustees on ..... 09 July 2024 ..... and signed on it's behalf by  
 ..... Trustee

**WOODTON UNITED CHARITIES**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 DECEMBER 2023**

**1. ACCOUNTING POLICIES**

**a) Accounting Convention**

The financial statements have been prepared in accordance with the provisions of Section 1A “Small Entities” of Financial Reporting Standard 102 “The Financial Reporting Standard applicable in the UK & Republic of Ireland”, the Companies Act 2006 & the Statement of Recommended Practice Accounting & Reporting by Charities issued in March 2005. The financial statements have been prepared under the historical cost convention.

**b) Investment Income**

Investment income is accounted for in the period in which the Charity is entitled to receipt.

**c) Fixed Asset Investments**

The Investments are Fixed Capital investments. The interest generated is shown as investment income.

**2. INVESTMENT INCOME**

	2023	2022
	£	£
Dividends	6,111	6,088
Bank Interest	943	299
Investment income	11,036	9,737
	<u>£18,090</u>	<u>£16,124</u>

**3. DIRECT CHARITABLE EXPENDITURE**

	2023	2022
	£	£
Grants	£8,726	£10,153

**4. MANAGEMENT AND ADMINISTRATION COSTS**

	2023	2022
	£	£
Administration	200	-
Accountants Remuneration	660	600
Insurance	793	779
Repairs	11,213	834
Professional Fees	4,304	2,226
Bank Charges	135	132
Investment expenses	1,386	1,459
	<u>£18,691</u>	<u>£6,030</u>

**WOODTON UNITED CHARITIES**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE PERIOD ENDED 31 DECEMBER 2023**

**5. ENDOWMENTS**

	2023 £	2022 £
<b>(a) COIF Shares</b>		
1,958.67 units at valuation – 31.12.22		35,599
1,958.67 units at valuation – 31.12.23	38,870	
<b>MOVEMENT IN VALUE</b>	<u>£3,271</u> =====	
<b>(b) COIF Permanent Shares</b>		
9,258.99 units at valuation – 31.12.22		168,281
9,258.99 units at valuation – 31.12.23	183,745	
<b>MOVEMENT IN VALUE</b>	<u>15,464</u> =====	

**WOODTON UNITED CHARITIES**  
**NOTES TO THE FINANCIAL STATEMENTS**  
**FOR THE PERIOD ENDED 31 DECEMBER 2023**

6. **INVESTMENTS**

	2023 £	2022 £
<b>(a) Blackrock Investment</b>		
25,571.80 units at valuation - 31.12.22		202,345
25,571.80 units at valuation - 31.12.23	215,892	
<b>MOVEMENT IN VALUE</b>	<u>£13,547</u> =====	
<b>(b) Nucleus Financial N355154</b>		
Account value at 31.12.22		70,577
Account value at 31.12.23	74,015	
<b>MOVEMENT IN VALUE</b>	<u>£3,438</u> =====	
<b>(c) Nucleus Financial N355155</b>		
Account value at 31.12.22		71,800
Account value at 31.12.23	76,169	
<b>MOVEMENT IN VALUE</b>	<u>£4,369</u> =====	

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF  
WOODTON UNITED CHARITIES**

I report on the accounts of the Charity for the year ended 31<sup>st</sup> December 2023, which are set out on pages 1 to 10.

**Respective responsibilities of Trustees and Examiner**

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year under Section 144 of the Charities Act 2011 (the charities Act) and that an independent examination is needed.

It is my responsibility to:

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

**Basis of Independent Examiner's Report**

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual terms or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a "true & fair" view & the report is limited to those matters set out in the statement below.

**Independent Examiner's Statement**

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements
  - to keep accounting records in accordance with Section 130 of the charities Act; and
  - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the charities Act have not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



.....  
Leslie Robert Newman FCA  
Newman & Co  
Chartered Accountants  
7 Hungate  
Beccles  
Suffolk  
NR34 9TT

Date: ..... 16/7/2024 .....