

Yew Tree Hall AGM 14 July 2025 – Chair report

Quite a year in the history of our hall. The committee is in excellent shape and has gone from strength to strength – unbelievable progress has been made, effectively from a standing start, on the redevelopment. More on that shortly.

The year started off with the trustees needing to find £10,000 for a fire alarm system and electrical upgrades. It wasn't something that we could put off but we were fortunate to be awarded a grant of half the amount from the Cumberland Council Lakes to Sea Community panel Fund to whom we are very much obliged – especially Jill Perry our local (Green) County Councillor. We also had some funds in reserve specifically for things like this.

Our social events programme remains healthy with a number of events and coffee mornings taking place – thank you to Melbreak Communities for their continued support with the coffee mornings and the contribution to the replacement water geyser. We've also introduced a 'drop-off zone' so drivers can stop by the door to drop off anyone with mobility needs. Particularly of note in events were the Race night and New Year's Eve event which went down an absolute storm. These events take a lot of organising and if it wasn't for the hours of work and organising put in by trustees and volunteers alike, they simply wouldn't happen. But they are so worth it, to have 80 people here having a great time is part of the whole point of the hall, that's what our forebears foresaw in 1909 and I'm sure they'd be absolutely delighted that the hall was still rocking 115 years later.

Hires and occasional events remain stable while our social and sporting groups continue to flourish and meet regularly. While U3A Bowls has recently consolidated their activity in Cockermouth, we have Gardening, History, Wildlife, Karate, Table tennis, Film Club, Move to Improve and The Malthouse Club. Our income from hires etc. is healthy and the modest hourly hire increase last April meets our ongoing maintenance commitments - Catherine will speak to the finances shortly.

We're all acutely aware of the dire need for a complete overhaul and redevelopment of the Grade II listed hall – borne out by the parish council questionnaire, while retaining its heritage, character and feel – all the qualities we love so much and why there is community determination to protect it, preserve it and promote it.

Working with Lorton Parish Council, the trustees' set-up a new Development Group, ably led by Cathy Lee. We quickly established very effective ways of working producing ideas and thoughts against a number of objectives. Those ideas turned into working sketches and we shared all of them with the community. The trustees agreed to donate £5k from reserves to get the ball rolling and we're also very grateful for the £2k contribution from Lorton Parish Council. Such was the belief in what we were doing, we quickly raised over £13k enabling us to start looking at the project in earnest. We contracted WKD Design, Cal Williamson, who'd done many hours of ex-gratia work on the hall previously, to commit some designs to full drawings. Along with a number of other contractors, a viable plan began to emerge. Following another round of consultation, we're now at a point where we have a 'preferred option'. But that is just the start of the formal process. We need to secure planning permission and just as importantly, we need to ensure we have the funds to build it.

At the same time we began to clear the undercroft area – it had never been properly cleaned since the floods of 2009 and 2015. A group of us cleared several tons of silt, mud, grime and rubbish. Some of you may have seen the results – the original vaulting and flag floors. And at the same time we were doing that, it was announced Jennings Brewery in Cockermouth had been bought with a view to brewing again. If ever there was an example of serendipity that was it. Cathy quickly established contact with the new owners and we now have a strong relationship with them based on the shared heritage and history of Jennings. Again, such was the cultural and heritage interest in what we were doing, we made the front page of the Keswick Reminder, Cumbria Life and the BBC website! ITV are still interested in making a mini documentary about the Jennings history and I'm in touch with both the BBC and ITV. And watch this space for the new 'Lorton Ale' coming to glass near you soon!

As part of the fund raising initiative we set up another sub-committee called Friends Of Yew Tree Hall (FOYTH) whose aims are to secure funding through new initiatives, events and grants. We additionally registered for, and were awarded, Gift Aid status by HMRC – this effectively means most donations are uplifted by 25%, a major contribution in its own right.

When we have a clearer picture of funding and project time-lines we'll be liaising with the Church and the school in terms of alternative arrangements and complimentary heritage projects.

I make no excuse for repeating what I said last year - the committee runs purely on the goodwill and voluntary time of the trustees, not to mention a significant number of volunteers who help us in many ways – there are literally thousands of hours invested in the upkeep and development of Yew Tree Hall. And that belief translates into donations – our redevelopment fund currently stands at an incredible £131k! So many thanks to all involved and especially to everyone that uses the hall for continuing to support the heart of the community, the epitome of Lorton life.

Independent Examiner's Report to the Trustees of the Yew Tree Hall, Lorton

I report on the accounts of the charity for the year ended 31 March 2025 set out overleaf.

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(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- follow the procedure laid down in the general Directions given by the Charity Commissioners under section 145(5)(b) of the 2011 Act; and
- 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 Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from 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 and fair view" and 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 2011 Act; and
 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the 2011 Acthave 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.



Mrs Ann Cummings FCCA
c/o Mitchells Auction Company Limited
Cockermouth

Date 5/7/25.

Yew Tree Hall Management Committee
Accounts for year ending 31 March 2025

Registered Charity

223947

Receipts	2025	2024
Hires	7664	6631
Events	3503	3147
Grants	5262	
Table & chair hire	60	40
Eden Arts (Film Night)	323	1904
E-on credit	1059	
Donations	1285	435
Donations (FOYTH)	106100	
Bank interest	420	211
Donations to FOYTH a/c	12255	
Total receipts	137931	12368
Payments		
Insurance	2662	2535
Electric	3407	3019
Water	336	328
Banking fees	97	99
Fire equipment	141	81
Fire Assesment		399
Electrical testing ⁽¹⁾		555
Phone/internet line	467	702
Website & booking system	328	120
Cleaning	930	897
Eden Arts (Film Night)	262	790
Maintenance	713	504
Allerdale License	180	70
PPL Music License	199	124
Re-development Costs	450	120
Gardening	1870	
Hall Events	814	
Fire Alam System	9357	
ACT fees		
Unpaid Cheque		
Donations ⁽²⁾		1425
Total Payments	22213	11768

Net Position 115718

Closing cash as at 31 March 2025

Current account	17487	4875
Reserve account	123385	20277
Closing balance 31 March	<u>140872</u>	<u>25152</u>

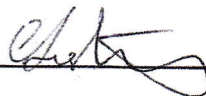
A.

- (1) Five yearly inspection
- (2) Cockermouth food bank/Mountain Rescue

Treasurer

Catherine Armstrong

Sign & date

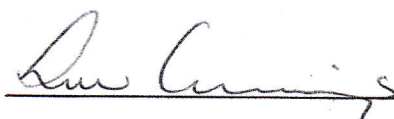
 3/7/25

I have reviewed the draft account prepared by the charity's Treasurer as above. My review covered the statements of YTHs current and reserve accounts with the HSBC bank and the cash book record of receipts and payments, together with supporting documentation contained in the 2024 account.

My conclusion is that the account of YTHMC for the 2024/25 year is consistent with these records.

Independent Examiner
(name)

Sign & date

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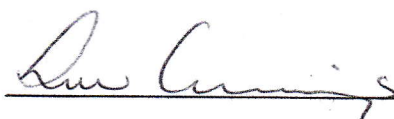
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