

**THE MOTHERS' UNION - DIOCESE OF YORK****TRUSTEES' ANNUAL REPORT  
YEAR ENDED 31 DECEMBER 2024**

The trustees present their report and the independently examined financial statements of the charity for the year ended 31 December 2024.

**REFERENCE AND ADMINISTRATIVE DETAILS**

|                                |  |
|--------------------------------|--|
| <b>Registered charity name</b> | The Mothers' Union - Diocese of York Charity |
| <b>Registration number</b>     | 249998                                       |
| <b>Principal office</b>        | 1 Bankside, Yarm, North Yorkshire, TS15 9RH  |

**THE TRUSTEES**

Mrs H Castle  
Mrs A Dewing  
Mrs B Ford  
Mrs J Local  
Mrs B Richardson  
Mrs C Wilson  
Mrs G Woodhall

|                             |   |
|-----------------------------|---|
| <b>Independent examiner</b> | Mr B Hopper<br>Foxville<br>Garth Ends Lane<br>Hemingbrough<br>Selby<br>North Yorkshire<br>YO8 6QW |
|-----------------------------|---|

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

- ❖ The Mothers' Union is an Anglican organisation which promotes the well-being of families worldwide. The charity is governed by a constitution updated in 2022.
- ❖ The Trustees control and manage the affairs of the charity in the Diocese. Trustees are elected for a three year period initially and may stand for re-election for a further three years. In cases of unfilled positions, the existing board may appoint a suitable person to fill the role.
- ❖ The Trustee Board is supported by a team of 3 Chaplains, one from each Archdeaconry.
- ❖ Safeguarding – the Diocese operates in accordance with the Mothers' Union national guidelines.
- ❖ Data Protection – data is stored and processed in line with national GDPR rules.

The Trustees' Annual Report was approved on 24 May 2025 and signed on behalf of the board of trustees by:

Mrs B M Ford, Diocesan Trustee

## Achievements and Performance


The theme for the 2021-2024 Triennium continued, 'Reimagining - Transformation Now'.

- ❖ Underpinning all our work is our objective to maintain a worldwide fellowship of Christians united in prayer, worship and service.
  - In spring and autumn 2024 we enjoyed two successful Diocesan retreats.
  - Members continued locally to participate in annual acts of witness which draw attention to and raise the profile of Mothers' Union objectives. In terms of worship, these include the Wave of Prayer acknowledging our work in link Dioceses across the world and the World Day of Prayer.
  - On a Diocesan level, York Minster included MU in a regular public service as an act of thanksgiving for the Triennium.
- ❖ A great deal of our work focusses on our objective to help those whose family life has met with adversity.
  - This was the third year usage of our new AFIA caravan. We offered holidays to 16 families in need, of which 4 bookings came via liaison with outside agencies.
  - Members responded with very positive fund-raising for Make a Mothers' Day, Summer of Hope and the Christmas special appeals. Donations were also made to all the ongoing national funds. Locally members continue to support community projects such as - women's refuges, hospital initiatives, refugees.
  - Public acts to mark the 16 days of activism against Gender-Based Violence were successfully conducted in 2024 and drew good response from the public. A weekday silence in York Minster again received support from members and visitors.
  - Branches have made good use of the national resources available for the Rise-Up campaign focussing on Domestic Abuse throughout the year.
- ❖ Via normal Church life, we have continued to engage with work in support of our objective to encourage parents in their role to develop the faith of their children.
  - Member involvement continued in Messy Church, Open the Book and toddler group activities.
  - Branch support for baptism families continued, for example with a gift of a knitted bear, and mark the anniversaries of the baptisms over a period of four years with cards.
  - Branch support for local clergy for couples getting married.
- ❖ The Trustee board has worked on aims set last year by:
  - success in recruiting Trustees for 2025-2027,
  - continuing with retreat and AFIA projects, and promoting the Rise Up project,
  - further simplifying administration paperwork for branches,
  - promoting the website.

## Plans for Future Periods

- ❖ 2024 sees the final year of the Triennium. The theme for 2025-2027 is Join Us and Join In. Review of membership and promotion ideas.
- ❖ Work on improving clergy liaison using clergy packs.
- ❖ Completion of the updated Handbook of Guidelines for Branches and updated Diocesan Prayer Diary.
- ❖ Continuing to provide families in need for our AFIA caravan holidays.
- ❖ Broadening the use of Rise Up resources in public places eg community centres.
- ❖ Expanding use of and contribution to our website.
- ❖ Planning for the MU 150<sup>th</sup> anniversary in 2026.

## Accounts for 2024

|   |  |                                      |                                 |                               |   |       |
|---|--|--------------------------------------|---------------------------------|-------------------------------|---|-------|
|  CHARITY COMMISSION<br>FOR ENGLAND AND WALES | The Mothers' Union - Diocese of York   |                                      | Charity Number<br>249998        | CC16a                         |   |       |
|   |  |                                      |                                 |                               |   |       |
|   | 01/01/2024                             | To                                   | 31/12/2024                      |                               |   |       |
| Section A Receipts and payments   |  |                                      |                                 |                               |   | Notes |
| Receipts  | Unrestricted funds<br>to the nearest £ | Restricted funds<br>to the nearest £ | Total funds<br>to the nearest £ | Last year<br>to the nearest £ |   |       |
| York Diocesan Funds   |  |                                      |                                 |                               |   |       |
| AFIA  |  | 8,743                                | 8,743                           | 10,112                        |   |       |
| Parenting   | -                                      | -                                    | -                               | 315                           |   |       |
| Retreats  | 10,123                                 |                                      | 10,123                          | 12,520                        |   |       |
| MUe Sales   | 7,218                                  |                                      | 7,218                           | 6,177                         |   |       |
| Sale of other goods   | -                                      | -                                    | -                               | 2,955                         |   |       |
| Donations from branches   | 271                                    | 693                                  | 964                             | 714                           | 3 |       |
| MUe Dividend  | 1,003                                  |                                      | 1,003                           | 1,061                         |   |       |
| Gift Aid  | 1,983                                  |                                      | 1,983                           | 453                           |   |       |
| Yorkshire Building Society interest   | 794                                    |                                      | 794                             | 259                           |   |       |
| Royal Bank of Scotland interest   | 268                                    |                                      | 268                             | 120                           |   |       |
| Investment Income   |  |                                      |                                 |                               |   |       |
| CBF deposit fund retained interest  | 1,684                                  |                                      | 1,684                           | 985                           |   |       |
| CBF short duration bond fund interest   | 106                                    |                                      | 106                             | 88                            |   |       |
| CBF short duration bond sale of shares  | 4,230                                  |                                      | 4,230                           | -                             |   |       |
| CBF investment fund interest  | 697                                    |                                      | 697                             | 686                           |   |       |
| Diocesan Subscriptions  | 5,488                                  |                                      | 5,488                           | 11,601                        |   |       |
| Mary Sumner House (MSH) funds   |  |                                      |                                 |                               |   |       |
| Subscriptions for central   |  | 18,013                               | 18,013                          | 17,409                        |   |       |
| Overseas: Literature & Development  |  | 415                                  | 415                             | 1,541                         |   |       |
| Overseas:general  |  | 1,846                                | 1,846                           | 1,078                         |   |       |
| Relief  |  | 1,251                                | 1,251                           | 1,092                         |   |       |
| Britain & Ireland   |  | 95                                   | 95                              | 150                           |   |       |
| MSH general   |  | 160                                  | 160                             | 250                           |   |       |
| Special Appeals   |  |                                      |                                 |                               |   |       |
| Make a Mother's Day   |  | 1,007                                | 1,007                           | 250                           |   |       |
| Summer of Hope  |  | 2,531                                | 2,531                           | 1,313                         |   |       |
| Christmas 2024  |  | 2,316                                | 2,316                           | 150                           |   |       |
| Total receipts  | 33,865                                 | 37,070                               | 70,935                          | 71,279                        |   |       |
| Payments  |  |                                      |                                 |                               |   |       |
| net loss in funds held in branch accounts   | 270                                    |                                      | 270                             | 3,350                         | 6 |       |
| York Diocesan Funds   |  |                                      |                                 |                               |   |       |
| Misc  | 1,312                                  |                                      | 1,312                           |                               |   |       |
| Diocesan President retirement gift  |  | 693                                  | 693                             | -                             | 3 |       |
| AFIA: expenses  |  | 12,620                               | 12,620                          | 916                           |   |       |
| AFIA: wages - caravan cleaner   |  | 117                                  | 117                             | 563                           |   |       |
| Indoor member prayer group  |  | 200                                  | 200                             | 600                           |   |       |
| Retreats  | 12,336                                 |                                      | 12,336                          | 12,211                        |   |       |
| Purchase of non-MUe goods for resale  | -                                      | -                                    | -                               | 2,488                         | 6 |       |
| Expenses  |  |                                      |                                 |                               |   |       |
| Trustees  | 1,155                                  |                                      | 1,155                           | 1,565                         |   |       |
| Diocesan Chaplain & reps  | 489                                    |                                      | 489                             | 555                           |   |       |
| Member Support  | 1,542                                  |                                      | 1,542                           | 795                           |   |       |
| Admin/Office  | 502                                    |                                      | 502                             | 963                           |   |       |
| Examiner Fee  | 450                                    |                                      | 450                             | 1,776                         |   |       |
| Mary Sumner House (MSH) funds   |  |                                      |                                 |                               |   |       |
| Subscriptions to central  |  | 17,890                               | 17,890                          | 17,427                        |   |       |
| MUe purchase orders   | 4,026                                  |                                      | 4,026                           | 13,883                        |   |       |
| Overseas: Literature & Development  |  | 415                                  | 415                             | 1,541                         |   |       |
| Overseas:general  |  | 1,846                                | 1,846                           | 1,078                         |   |       |
| Relief  |  | 1,251                                | 1,251                           | 1,092                         |   |       |
| Britain & Ireland   |  | 95                                   | 95                              | 150                           |   |       |
| MSH general   |  | 160                                  | 160                             | 250                           |   |       |
| Special Appeals   |  |                                      |                                 |                               |   |       |
| Make a Mother's Day   |  | 6,007                                | 6,007                           | 250                           | 8 |       |
| Summer of Hope  |  | 7,531                                | 7,531                           | 1,313                         | 8 |       |
| Christmas 2024  |  | 6,316                                | 6,316                           | 10,150                        | 8 |       |
| Total payments  | 22,082                                 | 55,141                               | 77,223                          | 72,916                        |   |       |
| Net of receipts/(payments)  | 11,783                                 | 18,071                               | 6,288                           | 1,638                         |   |       |
| Transfers between funds   | - 13,877                               | 13,877                               |                                 |                               |   |       |
| Cash funds last year end  | 49,259                                 | 17,868                               | 67,127                          |                               | 2 |       |
| Cash funds this year end  | 47,165                                 | 13,674                               | 60,839                          |                               |   |       |

| Section B Statement of assets and liabilities at the end of the period |  |                                 |                       |                          |
|--|--|---------------------------------|-----------------------|--------------------------|
|  |  | Unrestricted funds              | Restricted funds      | TOTAL                    |
|  |  | to nearest £                    | to nearest £          |                          |
| <b>Cash funds</b>  |  |                                 |                       |                          |
| Royal Bank of Scotland   |  | 6,725                           | 1,887                 | 8,612                    |
| Yorkshire Building Society   |  |                                 | 2,548                 | 2,548                    |
| surplus funds held in branches   |  | 16,270                          |                       | 16,270                   |
| CBF deposit fund   |  | 24,170                          | 9,239                 | 33,409                   |
|  |  | <b>47,165</b>                   | <b>13,674</b>         | <b>60,839</b>            |
|  |  |                                 |                       |                          |
|  |  | Unrestricted funds              | Restricted funds      |                          |
|  |  | to nearest £                    | to nearest £          |                          |
| <b>Other monetary assets</b>   |  |                                 |                       |                          |
|  |  |                                 |                       |                          |
| <b>Investment assets</b>   |  | Fund to which asset belongs     | Cost (optional)       | Current value (optional) |
| CBF investment fund  |  |                                 |                       | 25,672                   |
|  |  |                                 |                       |                          |
| <b>Assets retained for the charity's own use</b>                       |  | Fund to which asset belongs     | Cost (optional)       | Current value (optional) |
| MUe sales stock  |  | unrestricted - general          |                       | 2,163                    |
| caravan  |  | restricted - AFIA               | 25,016                | 17,510                   |
|  |  |                                 |                       |                          |
| <b>Liabilities</b>   |  | Fund to which liability relates | Amount due (optional) | When due (optional)      |
|  |  |                                 |                       |                          |
|  |  |                                 |                       |                          |
|  |  |                                 |                       |                          |
| <b>Signed by (on behalf of all the trustees )</b>                      |  | Print Name                      | Date of approval      |                          |
|  |  | Barbara Ford                    | 24/05/2025            |                          |
|  |  | Carole Wilson                   | 24/05/2025            |                          |

## Notes to the Accounts

### 1 General Information

The charity is a public benefit entity and a registered charity in England and Wales and is unincorporated. The address of the principal office is 1 Bankside, Yarm, North Yorkshire, TS15 9RH.

### 2 Basis of Accounting

The accounting is on a Receipts and Payments (R&P) basis.

### 3 Restricted Funds activity

A specific collection was made for a retirement gift for the outgoing Diocesan President.

| Fund      | 01/01/2024 | in       | out       | 31/12/2024 | held in | YBS      | RBS      | investment |
|-----------|------------|----------|-----------|------------|---------|----------|----------|------------|
| AFIA      | 11,893.05  | 8,743.12 | 12,736.82 | 7,899.35   |         | 2,000.00 | 3,000.00 | 2,899.35   |
| Parenting | 1,508.00   |          |           | 1,508.00   |         |          |          | 1,508.00   |
| Indoor    | 4,466.74   |          | 200.00    | 4,266.74   |         | 548.00   | 200.00   | 3,518.74   |
|           | 17,867.79  |          |           | 13,674.09  |         | 2,548.00 | 3,200.00 | 7,926.09   |

### 4 Unrestricted Funds activity

These include monies held in branches which are examined locally and reported to the Diocese annually.

Expenses incurred by Trustees on behalf of The Mothers' Union are reimbursed but no Trustee receives remuneration for services.

### 5 Investments

Three CBF funds were held. The values of these are shown at market value on 31 December 2024.

The Deposit Fund dividends are retained and reinvested in that fund.

The dividends for the Short Term Duration bond fund and Investment fund were paid into the Royal Bank of Scotland account and reported as Payments. The Short Term Duration bond fund was cashed in during 2024 to assist cash flow in 2025.

### 6 Mothers' Union Enterprises Ltd

Stocks are accounted for at the point of purchase and sale. The value of stock remaining in hand is recorded as an asset. Some orders since June have not yet been paid for. Mary Sumner House has been made aware of the need for this invoice information. No non-MUe goods for resale purchased this year. Sales receipts includes petty cash held £170; amount accounted in cash held in branches.

### 7 Caravan

This asset is subject to depreciation using the straight line principle at 10% per year. The current caravan is now 3 years old.

### 8 Reserves Policy

A policy has been established whereby surplus funds not otherwise committed should be the equivalent of one year's expenditure. It is considered that 12 months resources will give us sufficient funds to continue current activities in the event of a significant reduction in funding. This policy is reviewed annually by the Trustee Board to ensure forward commitments.

The £10,000 excess reserves agreed in 2023 was donated during 2024 to the national MU Make a Mothers' Day and Summer of Hope appeals. In 2024 the council of members approved a spend of £4,000 from excess reserves. This was given to the national MU Christmas 2024 appeal under the Big Give Double-Up scheme so had a worth of £8,000. This was augmented by branch and individual donations.

**Independent Examiners Report to Trustees of The Mothers' Union – Diocese of York  
Year Ended 31 December 2024**

I report to the trustees on my examination of the financial statements of The Mothers' Union – Diocese of York for the year ended 31st December 2024

**Respective responsibilities of Members of the Council and Examiner**

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

I report in respect of my examination of the charity's financial statements 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 Commission under section 145 (5)(b) of the 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:

- accounting records were not kept in respect of the charity as required by section 130 of the Act; or
- the financial statements do not accord with those records; or
- the financial statements do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than the any requirement that the accounts give a "true and fair view" which is not a matter considered as part of an independent examination.

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.

B Hopper  
10th April 2025