

# MIXBURY CHARITY

England & Wales · Charity number 309615

## Details

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**Other names**                      ROUNDELL PALMER AND WILLIAM PALMER FOR SCHOOL

**Status**                              Registered

**Legal form**                        Other

**Registered**                        1962-11-01

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

## Contact

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**Address**                            The Rectory  
Water Stratford Road  
Finmere  
Buckingham  
MK18 4AT

**Phone**                              01280 848192

**Email**                                [admin@shelswellparishes.info](mailto:admin@shelswellparishes.info)

## Activities

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**Objects:** PROMOTING THE EDUCATION (INCLUDING SOCIAL AND PHYSICAL TRAINING) OF PERSONS UNDER THE AGE OF 25 YEARS WHO ARE RESIDENT IN THE AREA OF BENEFIT AND IN PARTICULAR BUT WITHOUT PREJUDICE TO THE GENERALITY OF THE FOREGOING -(I) IN AWARDING SCHOLARSHIPS, 0EXHIBITIONS, BURSARIES, MAINTENANCE ALLOWANCES OR GRANTS TENABLE TO ANY SCHOOL, UNIVERSITY, COLLEGE OF EDUCATION OR OTHER INSTITUTION OF FURTHER (INCLUDING PROFESSIONAL AND TECHNICAL) EDUCATION APPROVED FOR THE PURPOSE BY THE TRUSTEES(II) IN PROVIDING FINANCIAL ASSISTANCE, OUTFITS, CLOTHING, TOOLS, INSTRUMENTS OR BOOKS TO ASSIST SUCH PERSONS TO PURSUE THEIR EDUCATION (INCLUDING THE STUDY OF MUSIC AND OTHER ARTS) TO UNDERTAKE TRAVEL IN FURTHERANCE THEREOF, OR TO PREPARE FOR OR ENTER A PROFESSION, TRADE, OCCUPATION OR SERVICE ON LEAVING SCHOOL, UNIVERSITY OR OTHER EDUCATIONAL ESTABLISHMENT.FOR FURTHER DETAILS SEE CLAUSE 26 OF SCHEME

**Activities:** Educational grants to benefit children & young people resident in the Parish of Mixbury, Northamptonshire

## Classification

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- **How:** Makes Grants To Organisations, Provides Other Finance
- **What:** Education/training, Religious Activities
- **Who:** Children/young People

## Geography

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- **Area of benefit:** CIVIL PARISH OF MIXBURY
- Northamptonshire
- Oxfordshire

## Finances

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Period end	Income	Expenditure	Assets	Employees
2024-12-31	£9,708	£4,857	-	-
2023-12-31	£100,258	£710	-	-
2022-12-31	£2,715	£980	-	-
2021-12-31	£2,801	£2,000	-	-
2020-12-31	£2,999	£1,000	-	-

## Trustees

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Name	Role	Appointed
REV ALICE ELIZABETH GOODALL	Chair	2016-01-19
Alec Howard		2017-04-06
MARTIN AYRES		2017-04-06

## Linked charities

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- REVEREND WILLIAM JOCELYN PALMER (309615-1)
- WILLIAM PARKINS (309615-2)

**MIXBURY CHARITY**

England & Wales - Charity number 309615

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# Accounts

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## Mixbury Charity

### Trustees Annual Report for the period 1<sup>st</sup> January 2023 to 31<sup>st</sup> December 2023

Charity's name: Mixbury Charity

Charity Number: 309615

Charity contact:

Rev Alice Goodall

Date of birth 8.4.1958

Telephone 01280 848192

The Rectory, Water Stratford Road, Finmere, Buckingham MK18 4AT

Names of Charity Trustees:

Alice Goodall

Rev Alice Goodall

Date of birth 8.4.1958

The Rectory

Water Stratford Road

Finmere

Buckingham

MK18 4AT

01280 848192

Martin Ayres

Mr Martin Ayres

Date of birth: 18.11.1970

Northwell Farm

Fulwell Road

Finmere

Buckingham

MK18 4AS

07899 792552

Alec Howard

Mr Alec Howard  
Date of birth: 11.3.1970  
Middlesteads  
Church Lane  
Mixbury  
NN13 5RP  
01280 848295

Jonathan Berrie

Mr Jonathan Berrie  
Date of birth: 11.06.1982  
Fuchsia Cottage  
14 Mixbury  
Brackley  
NN13 5RR  
07747 457190

## **Structure, Governance and Management**

The Governing Document is a Charity Commission Scheme sealed 19.11.1993.

## **Objectives and Activities**

The Mixbury Charity uses income from its capital investments to promote the education of under 25s and provide support to individuals entering work following full time education. The area of benefit is the civil parish of Mixbury

## **Achievements and Performance over the past year**

1. Meetings  
Meetings were held on 5<sup>th</sup> June, 10<sup>th</sup> August and 19<sup>th</sup> September, in addition to numerous phone calls and emails.
2. Sale of Land adjacent to Finmere Playing Fields  
The area of land adjacent to Finmere Playing Fields was sold to Finmere Parish Council on 17<sup>th</sup> March 2023 for £30,5000. The net proceeds of £26,812.30 were paid into the Mixbury Charity on 11<sup>th</sup> April.

In September 2023 Richard Goodland of Winckworth Sherwood contacted us to advise that they were needing to revisit the transaction. The land had been registered as an Asset of Community Value in January 2022, but they had failed to obtain a certificate confirming that the sale was carried out in accordance with the 2011 Localism Act and

2012 Regulations. Various steps were taken by Winckworth Sherwood to regularise the situation and the sale was finally completed on 12<sup>th</sup> April 2024.

### 3. Purchase of a field in Mixbury

- a. The 6 acre field off Evenley Road in Mixbury was put on the market in May 2023. We had previously discussed how it would be appropriate for the Mixbury Charity to purchase a piece of land in Mixbury, should one become available. Not only could this serve as a good investment, but it could be of great benefit to the children of Mixbury as a play area / playing field. It was agreed to make further enquiries.
- b. At a meeting held on 5<sup>th</sup> June, the Charity's Trustees resolved to invest the Charity's capital and the money generated by the sale of the land in Finmere to buy the land off Evenley Road in Mixbury, and to make an initial offer on the field for the guide price of £90,000. As offers were received from other interested parties, decisions were made to increase the offer, culminating in a final offer of £170,000 which was accepted by the seller.
- c. Advice was sought from the Diocesan Trustees and the charity formally resolved to use its capital, together with the money generated from the sale of land in Finmere to buy the Land off Evenley Road in Mixbury as a reinvestment.
- d. On 1<sup>st</sup> August, the Trustees commissioned Robinson and Hall (Alice Brodie) to carry out a Charity Act Report. This was received on 11<sup>th</sup> August. It reported that the freehold property was in good condition and that the price of £170,000, having been agreed after public marketing and a phase of negotiation, reflected the market value of the property.
- e. Two of the Charity's investment trusts were sold in November 2023 for £45,842.54. (CBF Global Equity Fund - £34,395.07 - and CBF Fixed Interest Funds - £11,447.47. The COIF Property funds shares required a 6 month notice period for their sale so would not be sold until May 2024.
- f. Discussions were held with the Mixbury Parish Meeting about the village renting the field, if successfully purchased, for use by the village.
- g. The money for the purchase was raised from:
  - i. Sale of the Charity's investment Trusts - £34,395
  - ii. Money from the Charity's community account - £62,377
  - iii. Donation from Finmere Quarry (OPES) – £10,000
  - iv. Donation from the Mixbury Village Fund - £47,000
  - v. A zero interest bridging loan from a local resident - £22,000 (reimbursed following the sale of the COIF Property Fund Investments in 2024)
- h. The purchase was completed by the end of November 2023

### 4. Grants

No grants were awarded this year.

## Financial review

Gross income	£100,258
Gross spending:	£710
Capital value:	£258,180

### Assets held:

- Allotment field in Finmere – included in capital for the first time stated at an encumbered realisable value of £72,500
- Field off Evenley Road in Mixbury – stated at full purchase price of £177,773
- Investment Units held in COIF Charities Property Fund stated at market value of £27,640
- Bank balance held at Barclays Bank - £2,267

## Financial Accounts

Due to the increase in transactions in the year and the likelihood of this being an ongoing situation in coming years (as a consequence of acquiring the Mixbury Field), it was decided to present the financial results in a conventional Operating Statement and Balance Sheet format.

All assets (land assets, investment assets and bank accounts) and liabilities of the Charity are fully reflected in the balances declared as at 31<sup>st</sup> December 2023. Where appropriate, comparative balances as at 31<sup>st</sup> December 2022 have been restated.

## Declaration

The Trustees declare they have approved the report above.

Signed on behalf of the Trustees:

Signature

*Alice Goodall*

Full name Alice Goodall

Date

# Mixbury Charity

## Accounts

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### Income and Expenditure

		<b>Operating Statement 2023</b>	<b>Operating Statement 2022</b>	<b>Variance</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
<b><u>Income</u></b>				
Rents Received		100	<b>100</b>	<b>0</b>
<u>Exceptional Items</u>				<b>0</b>
Donations Received	59,000			
Gain on Sale of Land	26,812			
Gain on Sale of Investments	<u>11,704</u>	<b>97,516</b>	<b>0</b>	97,516
Investment income		<b>2,642</b>	<b>2,615</b>	<b>27</b>
<b>Total Income</b>		<b>100,258</b>	<b>2,715</b>	<b>97,543</b>
<b><u>Expenditure</u></b>				
<b>Mixbury Field Maintenance</b>		<b>710</b>	<b>0</b>	<b>710</b>
<b>Total Costs</b>		<b>710</b>	<b>0</b>	<b>710</b>
<b>Surplus / (Deficit) for year</b>		<b>99,548</b>	<b>2,715</b>	<b>96,833</b>

# Mixbury Charity

## Accounts

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### Balance Sheet

		<u>2023</u>	<u>2022</u>	<u>Variance</u>
Land at Cost	Mixbury Field	177,773	0	177,773
Land at estimated valuation	Finmere Field	72,500	0	72,500
<b>Total Land</b>		<u>250,273</u>	<u>0</u>	<u>250,273</u>
Investments at Valuation	CBF C of E Short Duration Bond	0	11,116	(11,116)
	COIF Charities Property Fund	27,640	29,480	(1,840)
	CBF C of E Global Equity Fund	0	31,871	(31,871)
<b>Total Investment Securities</b>		<u>27,640</u>	<u>72,466</u>	<u>(44,826)</u>
<b>Cash at Bank</b>	Barclays	<u>2,267</u>	<u>24,353</u>	<u>(22,086)</u>
<b>Total assets</b>		<u>280,180</u>	<u>96,819</u>	<u>183,360</u>
Creditors	Short term funding Loan	(22,000)	0	(22,000)
<b>Net Assets</b>		<u>258,180</u>	<u>96,819</u>	<u>161,360</u>
<b>Represented by:</b>				
Reserves	Reserve b/f	81,904	79,189	2,715
	Adjustment - Finmere Field	72,500	0	72,500
	Surplus for Year	99,548	2,715	96,833
	Revaluation Reserve	4,228	14,916	(10,688)
<b>Total Reserves</b>		<u>258,180</u>	<u>96,819</u>	<u>161,360</u>

**12 months to 31 December 2023**

## **Independent Examiner's Report**

Report to the Trustees of the Mixbury Charity (Charity Number 309615) on the accounts for the year ended 31 December 2023

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### **Responsibilities and basis of report**

I report to the Trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 December 2023. 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 Trust'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 Commission under section 145(5)(b) of the Act.

### **Independent Examiner's Statement**

I am qualified to undertake the examination by being a qualified member of the Institute of Chartered Accountants of Scotland. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities Act
- the accounts did 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 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.

**Signed:**            *David Mitchell*

**Date:**                30 October 2024

**Name:**                David Mitchell

**Relevant Professional Body:**    Institute of Chartered Accountants of Scotland