

THE NORTH AND EAST YORKSHIRE MARK BENEVOLENT FUND

England & Wales · Charity number 517013

Details

Other names	PROVINCIAL GRAND LODGE MARK BENEVOLENT FUND
Status	Registered
Legal form	Other
Registered	1985-12-02
Register	View on the Charity Commission register

Contact

Address	3 Bluebell Way Skelton-in-Cleveland North Yorkshire TS12 2FB
Phone	07773771520
Email	provcharstwd@neyorksmark.com

Activities

Objects: TO OR FOR THE RELIEF OF SUCH POOR AND DISTRESSED BROTHER MASONS OR THEIR POOR AND DISTRESSED WIDOWS AND OTHER RELATIVES OR TO OR FOR THE BENEFIT OF SUCH MASONIC CHARITIES OR OTHER CHARITABLE INSTITUTION OR INSTITUTIONS, SOCIETY OR SOCIETIES AND CHARITABLE OBJECTS.

Activities: Purpose of the charity is to raise income from the Mark Lodges within Yorkshire North & East Yorkshire and apply that income to the benefit of; a) Distressed Mark Mason's, their widows or other family members b) To assist other Masonic Charities including the Mark Grand Charity c) To support other charitable institutions within the Province of Yorkshire North & East Yorkshire.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations
- **What:** General Charitable Purposes, The Prevention Or Relief Of Poverty
- **Who:** Children/young People, Elderly/old People, People With Disabilities, Other Charities Or Voluntary Bodies

Geography

- City Of York
- East Riding Of Yorkshire
- Kingston Upon Hull City
- North Yorkshire

Finances

Period end	Income	Expenditure	Assets	Employees
2025-04-05	£22,871	£17,121	-	-
2024-04-05	£30,083	£17,550	-	-
2023-04-05	£22,543	£19,679	-	-
2022-04-05	£33,008	£41,990	-	-
2021-04-05	£24,998	£24,116	-	-

Trustees

Name	Role	Appointed
David William Kirkham		2025-08-01
John White		2019-02-18
Michael John Townend		2025-09-04
Paul David Barham		2015-10-26

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Accounts



The North & East Yorkshire Mark Benevolent Fund

Registered Charity N° 517013

Established by Declaration of Trust, 1st July 1985

Annual Report of the Trustees for the Year ending 5th April 2024

Trustees

David Robert Clancey, Allan Cameron Scott, Paul David Barham & John White.

The Fund is managed by the Charity Committee comprising the appointed Charity Stewards of all Lodges under the Provincial Grand Mark Lodge, the immediate past Chairman of the Committee and the Provincial Grand Master, the Deputy Provincial Grand Master, the Assistant Provincial Grand Master and the Provincial Grand Charity Steward (who acts as Treasurer of the Fund and Secretary of the Committee).

The Charity Committee appoints the Trustees of the Fund who shall serve for 10 years or until age 75. The Chairman of the Committee is elected for a 1 year term by the Charity Committee.

All Trustees and Committee members give their time voluntarily and receive no remuneration or other benefits.

The Objects of the Fund are the relief of poor and distressed Brother Masons or their poor and distressed widows and other relatives, or the benefit of such Masonic Charities or other Charitable Institutions, Societies and charitable objects as the Charity Committee shall in duly constituted meeting direct.

The Fund's income is derived from donations made by individual Lodge members and from Lodge funds. In the year in question the total income was £26,473 including Gift Aid tax reclaimed on individual donations.

Where desired by the donor, individual donations may be accumulated and passed on the Grand Mark Fund of Benevolence (GMBF) when the donor has reached qualifying levels of donation to achieve patronage status.

In line with the duty to act for the public benefit within the constraints laid down in the Governing Document, the Fund invites all Lodges within the Province to put forward to the Charity Committee, through their Charity Stewards, those non-masonic charitable organisations which they believe would benefit from grants. To be eligible the organisation must be registered with the Charity Commission and operate solely in the geographic area of the province or demonstrate that any grants would be ring fenced and applied only within the province.

The Committee have adopted a policy that 5 larger Charities would be chosen to be beneficiaries for a 5 year period, each receiving a grant determined by the Committee once every 6 months within the 5 year period. Additionally, every 6 months the Committee determines which of the other organisations put forward by the Lodges or Committee members should receive a grant, bearing in mind the level of available funds.

In the year ending 5th April 2024 grants were made to

GMBF (patronage payments) [08]	£4,075
GMBF (Lincolnshire Festival Jewels) [08]	£500

Grants to Non-Masonic Charities:

5 Year Beneficiaries:

We can Dance	£1,000
Her Breast Friend	£1,000
RABI	£1,000
Littlefoot Trust	£500
Stape Silver Band	£500

These payments were the first to be made under the current 5-year programme.

6 Month Awards

Action Medical Relief	£250
Trac UK	£300
The Grenfell Club	£500
Redcar Development Trust	£500
Bedale Scout Group	£500
Tees Valley Together.	£500
Ryedale Special Families	£1,000
Hull Sea Cadets	£500

Total Expenditure	£22,803
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As a result of these activities the Accumulated Fund increased by £12,533.11 to £66,591.08, of which £35,455.38 is held in deposit accounts.

The Fund has a Reserve Policy agreed by the Committee on 20th October 2014 that £35,000 should be held in Reserve Accounts to cover future liabilities that may arise through patronage funding or emergency disaster funding.

The Trustees would like to place on record their appreciation of the hard work done by the Lodge Charity Stewards and to all the Lodge members for their generosity.

The Trustees declare that they have approved this Trustee Report.

Signed on behalf of the Charity's Trustees

Lee Barry Richardson

Provincial Grand Charity Steward, Secretary

Date 23rd November 2024

**THE NORTH AND EAST YORKSHIRE
MARK BENEVOLENT FUND**
(Registered Charity 517013)
Charitable Sources Unrestricted Funds

INCOME AND EXPENDITURE ACCOUNT YEAR ENDED 5th APRIL 2024	2024 £	2023 £
INCOME		
Mark Lodges	22,305	13,854
Bank Interest	286	93
Festival Badges	400	760
Tax Reclaimed	2,801	1,784
Donations (incl. Prov. Grand Lodge Meetings)	4,291	6,053
	<u>30,083</u>	<u>22,544</u>
EXPENDITURE		
Grand Mark Benevolent Fund	9,000	2,103
Festival Badges	500	1,000
Non Masonic Charities	8,050	11,326
GMBF Collarettes	0	5,250
Connaught Court/West Yorks Festival	0	0
	<u>17,550</u>	<u>19,679</u>
Excess of Expenditure over Income/ Excess of Income over Expenditure	<u>12,533</u>	<u>2,865</u>
BALANCE SHEET AS AT 5th APRIL 2024		
CURRENT ASSETS		
TSB Current Account	31,136	18,889
TSB Deposit Account	0	0
Virgin Money Deposit Account	35,455	35,169
	<u>66,591</u>	<u>54,058</u>
Debtor HMRC	0	0
	<u>66,591</u>	<u>54,058</u>
ACCUMULATED FUND		
Balance at 6th April 2023	54,058	51,193
Less: Excess of Expenditure over Income for the year	0	0
Add: Excess of Income over Expenditure for the year	12,533	2,865
Balance at 5th April 2024	<u>66,591</u>	<u>54,058</u>
APPROPRIATION		
General Reserve	61,265	54,058
Designated Funds - 2033 Festival	5,326	0
	<u>66,591</u>	<u>54,058</u>

Note: The Charity has a contingent liability in respect of amounts received from members, which may ultimately be used as payments towards Grand Mark Lodge charity collarettes: the figure has not been quantified.

Report of the Accounts Examiner

I have reported to the Charity Trustees of The North and East Yorkshire Mark Benevolent Fund that I have carried out an independent examination of the accounts of the Fund for the year ended 5th April 2024 and have given them an unqualified report in accordance with the General Directions given by the Charity Commissioners.



Whitby: August 2024

Trevor Chalmers FCCA

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THE NORTH AND EAST YORKSHIRE MARK BENEVOLENT FUND

England & Wales - Charity number 517013

Accounts



Trustees' Annual Report for the period

	Period start date				Period end date		
From	06	04	2021	To	05	04	2022

Section A Reference and administration details

Charity name

The North & East Yorkshire Mark Benevolent Fund

Other names charity is known by

Registered charity number (if any)

517013

Charity's principal address

Glebe House Seaton Road
 Bewholme
 Driffield
Postcode YO25 8EB

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	David Robert Clancey	President		
2	Allan Cameron Scott			
3	Paul David Barham			
4	John White			
5				
6				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser

Name

Address

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Trust Deed 1 st July 1985
How the charity is constituted (eg. trust, association, company)	Trust
Trustee selection methods (eg. appointed by, elected by)	Trustees are elected by the Charity Committee and appointed by the existing trustees by deed.

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

<p>In accordance with the Governing Document the day to day management of the Charity is undertaken by the Charity Committee.</p> <p>The Charity Committee is made up of an elected representative from each Lodge within the Province. The Chairman of the Committee is elected from within the Committee membership and serves a one year term of office. The Secretary to the Committee is appointed by the President of the Charity and also acts as treasurer.</p>

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

<p>To raise income from Mark Lodges within the Province for the relief of poor and distressed Mark Masons and their dependents and to support the Grand Mark Benevolent Fund and non-masonic charities within the Mark Province of North & East Yorkshire.</p> <p>The Charity does not raise funds from the general public.</p>
<p>The Charity awards grants to non-masonic charities in the Province. These may be one-off grants or spread over a 5 year period.</p> <p>Having regard to the statutory duty to act for the public benefit and within the constraints of the Governing Document, the Charity Committee invites recommendations from the Mark Lodges as to those non-masonic charities within the Province which would most benefit from these grants.</p>

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

To be eligible for a grant from the Charity, non-masonic charities must be registered with the Charity Commission and either wholly based within the Province or ring fence any grant for use only within the Province, for the benefit of the local community.

The Charity has adopted a policy that up to 5 eligible Charities would be selected to be beneficiaries over a 5 year period. Other charities are eligible for one-off grants.

The Charity Committee meets twice a year and determines which charities should be awarded grants, and how much, having regard to the available funds.

In this financial year the Charity raised over £33,000 from within the Mark membership of the Province.

Grants were awarded to 10 non-masonic charities including the 4 in the 5 year programme. The total amount awarded was £14,264.

In addition the Charity supported the work of the Grand Mark Benevolent Fund with donations totalling £24,726 of which £11,000 was designated for their Ukrainian Relief Fund. and £5,000 released from reserves.

Section E

Financial review

Brief statement of the charity's policy on reserves

The Charity has a reserves policy agreed in 2014 and regularly reviewed since, that £35,000 should be held in reserve to cover future liabilities that may arise and emergency disaster funding. At the year end the Reserve Account stood at £35,076..

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Charitable income was significantly boosted this year by members donating funds totalling £11,000 to be passed on to the Grand Mark Benevolent Fund for Ukrainian Relief. In addition £3,000 was donated to support the Connaught Court Care Home operated by the Masonic Charitable Foundation whose normal fundraising had been severely reduced by Covid restrictions. Overall charitable giving amounted to £41,990 resulting in a planned reduction in reserves and a £2,000 reduction in the current account balance.

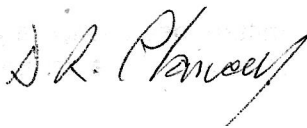

Section F Other optional information

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Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	David Robert Clancey	William Stephen Hawkes
Position (eg Secretary, Chair, etc)	President	Secretary

Date

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INCOME		
Mark Lodges	14,760	20,036
Bank Interest	53	196
Festival Badges	620	170
Tax Reclaimed	3,107	2,222
Donations (incl. Prov. Grand Lodge Meetings)	<u>14,468</u>	<u>2,374</u>
	<u>33,008</u>	<u>24,998</u>
EXPENDITURE		
Grand Mark Benevolent Fund	16,000	500
Festival Badges	500	500
Non Masonic Charities	14,264	16,500
GMBF Collarettes	8,226	5,616
Connaught Court/West Yorks Festival	<u>3,000</u>	<u>1,000</u>
	41,990	24,116
Excess of Expenditure over Income/ Excess of Income over Expenditure	<u><u>-8,982</u></u>	<u><u>882</u></u>
BALANCE SHEET AS AT 5th APRIL 2022		
CURRENT ASSETS		
TSB Current Account	16,117	17,929
TSB Deposit Account	0	0
Virgin Money Deposit Account	<u>35,076</u>	<u>40,024</u>
	51,193	57,953
Debtor HMRC	0	2,222
	<u><u>51,193</u></u>	<u><u>60,175</u></u>
ACCUMULATED FUND		
Balance at 6th April 2021	60,175	59,293
Less: Excess of Expenditure over Income for the year	8,982	0
Add: Excess of Income over Expenditure for the year	0	882
Balance at 5th April 2022	<u><u>51,193</u></u>	<u><u>60,175</u></u>
APPROPRIATION		
General Reserve	51,193	60,175
Designated Funds	0	0
	<u><u>51,193</u></u>	<u><u>60,175</u></u>

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