BCC

BOROUGHBRIDGE
COMMUNITY CHARITY

ANNUAL REPORT & ACCOUNTS

APRIL 2025 – MARCH 2026

Boroughbridge Community Charity, 17 St James Square, Boroughbridge, York, YO51 9AR
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BOROUGHBRIDGE COMMUNITY CHARITY

ANNUAL REPORT & ACCOUNTS

1 APRIL 2025 TO 31 MARCH 2026

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BOROUGHBRIDGE COMMUNITY CHARITY

ANNUAL REPORT & ACCOUNTS 2025-26

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OVERVIEW

Boroughbridge Community Charity (BCC) is a charity providing a range of community services to an extensively rural area, its radius being approximately 15 miles, supporting Boroughbridge and 32 surrounding villages.

Our Vision is for everyone in the community of Boroughbridge and District to be connected, included and supported.

Our mission is to:
Provide community support in response to identified needs.
Promote social inclusion.
Encourage and facilitate voluntary activity.
Encourage partnership working.
Advocate for change by being a voice within the community.

The office is located at 17 St James Square, Boroughbridge, YO51 9AR, telephone 01423 324504 and email at admin@bcccharity.co.uk.

Bankers: HSBC Bank

Independent Examiner: Malcolm Wilson

The Financial Statements were prepared by Susan Jeyes, BCC Treasurer.

Board of Trustee meetings were held on 23 April 2025, 23 July 2025(AGM), 22 October 2025, 27 January 2026.

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STRUCTURE, GOVERNANCE AND MANAGEMENT

Constitution:
Boroughbridge Community Charity (BCC) is a Charitable Incorporated Organisation (CIO) and is managed by a Board of Trustees to fulfil its constitutional objects.

Organisational structure and decision making:
The Board of Trustees has overall responsibility for the charity in ensuring that it is well run and that it continues to deliver the charitable objects for the benefit of the people for whom it has been set up. During this period there were the maximum of 12 Trustees on the Board (as listed below).

The Board develops the strategy and agrees and maintains the vision, mission, and values of the charity. The Board meets around six times per year, excluding the AGM, when it discusses and monitors the work and performance of the charity.

Recruiting and appointing Trustees:
Trustee vacancies are advertised, and applicants are interviewed prior to meeting with the full Board. Induction into the workings of the Charity is carried out by the Chair.

Management/employees (all part-time, 1.8 FTP equivalent):
Karen Parker, General Manager
Barbara Cleeland, Deputy & Finance Manager
Sue Robson, Administration Assistant

TRUSTEES during this period
Jules Preston (Chair from January 2023)
Susan Jeyes (Treasurer)
Nic Holmes
Jan Maltby
Nigel Brunyee
Jonathan Foster
Ella Scaife (appointed 12th May 2025)
Michael Hadley (appointed 24th July 2025)
Paul Maddison (appointed 24th July 2025)
Becky Hazel-Owram (appointed 27th January 2026)
Andrew Gudgeon (appointed 27th January 2026)

Andy Travis (resigned 24th July 2025)

FINANCIAL REVIEW

During the financial year 2025-26, the charity received the third and final year of funding from North Yorkshire Council (NYC) to work towards becoming a Community Anchor Organisation. This was BCC's main source of funding in this period.

Other smaller amounts of funding came from NYC Community Passenger Transport to support the charity's community volunteer car transport scheme; a small grant from NYC to support volunteers with hi-vis jackets, lanyards etc; a food support grant from Nidderdale Plus and a small grant for the NHS Cancer Alliance Project.

Savings accounts were held with Redwood Bank and United Trust. These investments were made to attain a good return and provide security for the charity.

As predicted, the 2025-26 financial year ended with a significant shortfall, and this was met by taking funds from the charity's reserves. Should BCC not be successful in securing substantial funding in the 2026-27 financial year, Trustees have agreed that its reserves will support this, should it be needed.

RESERVES POLICY

The reserves are allocated as follows:

- £50,000 to support operating costs for a projected shortfall in 2026/27 (should substantial funding not be secured)
- £45,000 towards replacement of minibus (existing minibuses now 9½ years and 7 years old)
- £45,000 to support the 2023-2028 Strategic Plan
- £50,000 towards new office premises or for adaptations at existing location.

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Chair's Annual Report

As mentioned in last year's annual report I will be retiring as Chair at the AGM. It has been a great honour to chair such a great organisation. A new Chair will be confirmed at the AGM.

Services continue to be in high demand with hospital appointments, opticians, dentist, picking up prescriptions, shopping, visiting loved ones in hospital being the mainstay of our services. Our bus trips are popular going far and wide to places of interest. The team at BCC and our volunteers have continued to provide a literal life-line to many of the most vulnerable in our community. To those core services we support the Food Larder, working closely with Boroughbridge Lions, and we are also involved in the development of a Men's Shed which creates space for men to talk safely about mental health issues. Rolling out awareness of the use of information technology is another key development along with stalwarts such as coffee mornings and keep fit classes.

Three years ago, we developed a 3-year Strategic Plan and we began the journey to becoming a Community Anchor Organisation, and we have broadly got to where we should be according to those plans. We have a much greater presence on social media. A strong body of Trustees and several new volunteers. But suitable premises, which allow for a good working environment, space for confidential chats with clients and space for a range of activities, continues to be a priority. I am pleased to say that promising discussions with the library (BACLA) trustees, who have the lease for the whole building, are to begin soon to establish how much can be achieved if we stay in our present location.

We still have healthy financial reserves which gives us the confidence to move forward, but they won't last forever and, whilst we broke even in 2023/24 and 2024/25 we ended 2025/26 with a deficit of some £42,000. That was better than forecast but reminds us that at that rate reserves won't last forever. The attached accounts demonstrate a better year than anticipated. Our IT client management system is now in place which should provide us with some efficiencies, but we will still have expenditure on staffing, any solution concerning premises and our mini-buses will need replacing eventually. We can only continue to help the community of Boroughbridge and District if we continue to expand. Grant seeking will be a key consideration for the next year.

During the year there has been some changes to the Board of Trustees. We were pleased to welcome Ella Scaife (actually joined in March 2025), Mike Hadley, Paul Maddison, Andrew Gudgeon and Rebecca Hazel-Owen (grand-daughter of the original founder some 51 years ago). All have had an immediate impact and I, and the other Trustees, are grateful for their input. Unfortunately, Andy Travis resigned but keeps in touch and looks forward to being able to return.

I would especially like to thank the BCC team of Karen, Barbara and Sue. They work many hours above and beyond in order to serve the community. Rachel Lindley continues in the role of secretary to the Board of Trustees and keeps me right. Thank you, all.

We have a great team of volunteers. They truly make a difference. New volunteers will always be very welcome and if you like the thought of driving a mini-bus to some great places or using the new electric vehicle or meet some lovely people, then let us know. And last but no means least we have the support of a number of businesses and organisations. Reed Boardall continue to let us park the EV on their site and give us free charging. We also receive many personal donations. The community of Boroughbridge and District thank you all. It genuinely wouldn't be possible without you.

Jules Preston MBE,
Chair of the Board of Trustees.

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GENERAL MANAGER'S REPORT

50 Years Celebration – From Little Acorns Grow Mighty Oaks

In 1975, some 50 years ago, Dr Hazel - a GP in Boroughbridge - first had the idea of the need for transport to ensure that those patients in need, without their own transport were able to get to the surgery and local hospitals for treatment. Volunteers who ran a social group for retired people in Boroughbridge, known as the Good Companions and The Chamber of Trade, raised funds to purchase an old ambulance which could be used to transport people from outlying villages and Boroughbridge into the surgery and hospitals. Fundraising began and donations were received. The group opened a bank account and became Boroughbridge Community Care (BCC). The provision of community transport expanded, and BCC registered as a charity. Thereafter Boroughbridge Community Care became Boroughbridge Community Charity. In October 2025, we held a BCC 50th celebration party. Many people connected to the charity were invited and this included the daughter and granddaughter of the late Dr Hazel and Ian Hick, one of the founders of our charity and a former trustee. We are thankful that the granddaughter of the late Dr Hazel, Rebecca Hazel Owram, has now become one of our trustees.

Board of Trustees

Staff and I would like to extend our gratitude to our outstanding Board of Trustees and Chair Jules Preston. Thank you for your dedication, governance, strategic guidance, unwavering enthusiasm and giving your time so generously.

Volunteers

Thank you to our volunteers who offer their time, skills and kindness. You make a huge difference to the lives of those seeking support, advice and guidance. You help people to feel connected and socially included within our community, which contributes to improved health and wellbeing.

Strategic Plan

BCC has a Strategic Plan which responds to the changing times in which we operate and sets the direction and goals for Boroughbridge Community Charity (BCC) until 2028. Ultimately, we want to be a resilient charity, capable of responding to community need.

Community Anchor Organisation

We are a community anchor, focused on community need, to improve wellbeing, reduce health inequalities, improve social connections and strengthen community resilience, cohesion and inclusion. We are the Community Anchor Organisation for Boroughbridge and District for which BCC receives a funding contribution from North Yorkshire Council.

Stay Healthy, Independent & Connected Grant

We have received funding during this year from North Yorkshire Council under the provision of this three year 'Stay Healthy, Independent and Connected' grant. This grant is a contribution to funding the following supportive and social activities to help people stay healthy, independent and connected within our community: -

Every Friday throughout the year our team of amazing volunteers, serve refreshments, cake and biscuits at our lively social coffee morning. This year 1502 visitors enjoyed our coffee morning. Volunteers gave 450 hours of their time helping with this activity.

Our weekly exercise class - run by our qualified fitness tutor, Marilyn, and volunteer, Terri - continues to be in great demand, with a waiting list of people wishing to access the class. This is a low-level class that participants, mostly older men and women, can do standing or sitting. Refreshments are served at the end of the class and enjoyed by all. Our two volunteers gave196 hours of their time to make this activity so successful.

We have continued during this period to provide an assisted shopping service, for those who have difficulty shopping independently and we shop for those unable to leave their home. We have a dedicated team of twelve volunteer shoppers. This year ten people benefitted from this shopping service every week. In total this amounted to 520 individual shops delivered. It is difficult to measure the time volunteers gave, as often they make time for a cup of tea and a chat with those they shop for; certainly equating to more than 1000 volunteer hours.

Prescription deliveries are collected from the GP surgery dispensary in Boroughbridge and delivered to outlying post offices in rural villages where they can be collected by households without access to transport. This is a weekly service provided by our volunteers, who gave 72 hours of their time.

Our two minibuses were used to offer door-to-door accessible services from individuals' homes to M&S food in Ripon every month. Our minibuses were also used for our popular monthly lunch club.164 people had lunch at ten different local venues this year and there were 71 individuals who enjoyed shopping at M&S food. This provision is aimed at people with limited mobility. Thank you to our dedicated volunteer minibus drivers and escorts who make this possible and made such a difference to the wellbeing of those who use this service.

Community Transport

We have two 17-seater minibuses, a team of volunteers who drive them, and volunteers who act as escort to check people safely on and off the bus.

Every year we offer a timetable of outings to places of interest. This year 334 people went to gardens, theatres, Skipton Canal and Teesside River cruises, Darlington Railway Museum, Salts Mill at Saltaire and seaside venues.

Our minibuses, together with our volunteer drivers, are used by schools for educational purposes and other charitable organisations, including U3A, WIs and local village events.

The rural area we cover has limited public transport. Older people in particular experience challenges in accessing health and wellbeing appointments. Our volunteer car transport scheme continues to be essential to our community.

Community transport is provided by our team of 26 volunteer drivers who use either their own cars or our Community EV.

This year our drivers made 4280 journeys and gave 3177 hours of their time, travelling to hospitals in Harrogate, Hull, Middlesborough, Leeds, York and Ripon.

Digital Inclusion
Our volunteer Tim Joynson is the Digital Lead. He has advertised, recruited and increased the team of talented and knowledgeable digital volunteers to nine and successfully expanded the offering of this invaluable IT support service to three locations at Boroughbridge, Green Hammerton and Tockwith.

During this period 244 people have sought IT assistance at these sessions.

Requests for help range from setting up and learning to use smart phones, laptops, online billing, accessing NHS App, music, email issues, registering with the council, storage of photographs and pairing hearing aids with IT.

Many users of this service attend several sessions to improve their learning and understanding.

Community Larder
The aim of the Community Larder is to engage with our community to help food waste and promote environmental action. The Community Larder was formed in April 2022, in a collaboration between BCC and Boroughbridge Lions. The Community Larder is held in Boroughbridge Methodist Church Hall. It is open to the public every Wednesday. Since opening 68,000 tonnes of food has been prevented from going to landfill and 12,072 people have visited the Community Larder. The Community Larder is now operated by 40 committed volunteers and overseen by a management committee. It is self-funding.

Boroughbridge Community Charity are enormously grateful for all the donations received from individuals, parish councils, village committees, local businesses, volunteers and members of our community. Thank you to all who held events, made hampers or products to sell to raise funds for our charity. Thank you to Reed Boardall for your generous sponsorship of our EV.

Thank you to Malcolm Wilson, who kindly conducts the role of Independent Examiner of our accounts.

Thank you to our part time staff, Barbara Cleeland, Finance & Deputy Manager, and Sue Robson, Administration Assistant, who go over and beyond their working hours to make Boroughbridge Community Charity thrive.

Karen Parker.
General Manager.

BOROUGHBRIDGE COMMUNITY CHARITY

FINANCIAL STATEMENTS FOR THE YEAR ENDED 5 APRIL 2026

Charity Number 1171451
17 St James Square
Boroughbridge
York, YO51 9AR

Receipts and Payments Account	Note	2026 £	2025 £
Receipts			
Grants	2	32,359	119,513
Fundraising and Donations	2	11,576	16,144
Charitable activities – income from clients	3	29,519	28,993
Investment income	4	9,184	4,634
Total receipts		**82,638**	**169,284**
Payments			
Fundraising costs	2	1,912	1,858
Costs of charitable activities	3	23,453	23,523
Salaries		71,466	71,229
Other administrative expenses	5	20,186	57,266
Total payments		**117,017**	**153,876**
(Deficit) / Surplus of receipts		**(34,379)**	**15,408**
Operating bank accounts brought forward		217,584	202,176
Operating bank accounts carried forward		**183,205**	**217,584**

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Statement of Assets and Liabilities	2026 £	2025 £
HSBC current account	31,707	74,312
Deposit accounts	151,498	143,272
Total operating bank accounts	**183,205**	**217,584**
COIF Charities Investment Fund shares at market value	30,243	31,494
Assets retained for the use of the charity	31,200	50,500
Total assets	**244,468**	**299,578**

The COIF investment comprises 1,673.11 income units of the Charities Investment Fund and is stated at the bid price on 5 April 2026 of £18.0757 per unit *(31 March 2025: £18.8239 per unit)*. The historic cost of the investment was £16,874 and its value was £32,064 on 13 July 2026, being the latest practicable valuation date prior to these financial statements being approved by the trustees.

In the opinion of the trustees, fixed assets comprising equipment and furniture purchased in prior years are of negligible disposal value. Assets retained for the use of the charity comprise a community electric car purchased in 2025 and two minibuses, of which one was donated to the charity in October 2016 and the other was purchased in February 2019. The net disposal value of these vehicles is estimated to be £20,000, £4,000 and £7,200 respectively *(2025: £37,500, £4,500 and £8,500)*.

At 5 April 2026 the charity had no liabilities *(2025: £nil)* and in neither year were any of the charity's assets charged as securities for amounts owing.

The Financial Statements were approved by the trustees at the annual general meeting on 28 July 2026 and signed on their behalf by

..... Chairman ..... Treasurer

..... Secretary

Dated 28 July 2026

Notes to the financial statements

Note 1 The financial statements are prepared on the receipts and payments basis.

Note 2 **GRANTS & FUNDRAISING**	**2026** **Receipts** **£**	**2026** **Payments** **£**	**2025** **Receipts** **£**	**2025** **Payments** **£**
Grants				
NYC grants	32,009	-	116,983	-
Humber and Wolds HWRA	350		-	-
Two Ridings Community Foundation	-	-	2,530	-
	32,359	**-**	**119,513**	**-**
Fundraising & Donations				
Friday coffee mornings	3,710	114	2,743	48
Other fundraising activities	2,451	128	6,437	540
Donations	3,081	-	4,407	-
100 Club	2,334	1,670	2,557	1,270
	11,576	**1,912**	**16,144**	**1,858**

Note 3 **CHARITABLE ACTIVITIES**	**2026** **Receipts** **£**	**2026** **Payments** **£**	**2025** **Receipts** **£**	**2025** **Payments** **£**
Minibus journeys	10,162	4,749	9,206	3,273
Minibus external hire	11,712	-	13,350	-
Minibus costs	-	7,879	-	8,187
Car transport	1,083	828	1,252	1,266
Community car	2,064	4,371	-	1,384
M&S shopping trips	515	-	435	-
Lunch Club outings	609	43	482	22
Wheelchairs	218	-	365	151
Exercise classes	2,268	1,380	2,460	1,395
GP dispensary deliveries	781	638	603	599
Food support	1,500	-	-	-
Community larder	-	-	800	-
Digital Hub project expenses	-	1,780	-	2,768
Men’s Shed project	-	104	-	159
Emergency food parcels	-	-	-	200
Digital Hub project equipment	-	-	-	4,044
Sundries	107	181	40	75
	29,519	**23,453**	**28,993**	**23,523**

Notes to the financial statements (continued)

Note 4 INVESTMENT INCOME	2026 £	2025 £
Bank & building society interest	8,226	3,704
COIF Charities Investment Fund dividends	958	930
	9,184	**4,634**

Note 5 OTHER ADMINISTRATIVE EXPENSE	2026 £	2025 £
Rent	5,148	4,971
IT support	2,541	3,389
Office equipment	261	614
Insurance	1,274	509
Telecommunications	1,332	966
DBS searches	430	296
Postage	59	38
Website	800	400
Stationery	475	366
Bank charges	147	188
Staff training	-	38
Secretarial support	300	500
Secretarial sundries	63	87
PR & Publicity	191	1,404
Purchase of Community Car	-	43,500
Purchase of Customer relationship management system	4,229	-
50th Anniversary celebration	2,341	-
Hi-Vis vests	595	-
	20,186	**57,266**

BOROUGHBRIDGE COMMUNITY CHARITY

FINANCIAL STATEMENTS FOR THE YEAR ENDED 5 APRIL 2026

Independent Examiner's report to the trustees

I report on the financial statements of the charity for the year ended 5th April 2026 which are set out on the previous four pages.

Respective responsibilities of the Trustees and Independent 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 procedures 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 report to the trustees (continued)

Independent Examiner's Statement

In connection with my examination, no matters have come to my attention;

1. which give 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 comply with the accounting requirements of the 2011 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.



……
Malcolm Wilson
Chartered Accountant 1979 – 2016 (now retired)
The Granary
Main Street
Great Ouseburn
York, YO26 9RQ

28 July 2026