ANNUAL REPORT & FINANCIAL STATEMENTS 2025-26

Yorkshire Funders



CHAIR'S INTRODUCTION

It is my pleasure to introduce Yorkshire Funders' annual report for 2025/26. It has been another exciting year for our charity as we continue to build on the strength of our long-standing network of funders across the region.

I find it heartening to be part of a network whose members are committed to continuous learning, who are willing to challenge themselves, and are open to sharing their own insights and learning to support the work of new funders. In the context of an ever more polarised society, where competition is prioritised over collaboration, it is important that spaces where we can have open, supportive conversations and build strong relationships, are created.

I want to take a moment to thank our members, corporate sponsors, and core supporters who make this important work possible.

As I reflect on this year and look ahead, I am reminded that Yorkshire Funders' strength lies in its members: those who are part of the network today, and those who began the journey over 30 years ago, generously giving their time, energy and resources to build the foundations we in turn now build upon.

Their commitment has shaped a trusted organisation where funders can connect, learn and improve. As we enter the next chapter, our role is clear: to continue strengthening that space, enable collaboration, and support funders to make a lasting difference for communities across Yorkshire and Humber and the wider North.



TIM CUTTS

Yorkshire Funders, Chair

LEGAL & ADMINISTRATION INFORMATION

Trustees

Peter Timothy Cutts	Chair	Reappointed 18th November 2024
Gemma Brookes	Trustee	Appointed 6th November 2023
Jess Cook	Trustee	Appointed 9th June 2026
Imogen Graham	Trustee	Appointed 6th November 2023
Kath Lindley DL	Trustee	Reappointed 4th November 2025
Carla Marshall	Trustee	Appointed 9th June 2026
Joe Thompson	Trustee	Appointed 9th June 2026
David Warner MBE	Trustee	Reappointed 4th November 2025
Bruce Warnes	Trustee	Reappointed 18th November 2024

Consultants and Staff

Anjelica Finnegan	Associate Director of Programmes
Alex Hartley	Events, Communication & Admin Officer

Registered Office

Harlig House
Skipton Road
Ilkley
LS29 9RP

Bankers

HSBC
8 Canada Square
London
E14 5HQ

Independent Examiners

Hunter Gee Holroyd
Club Chambers
Museum Street
York
YO1 7DN

Charitable Incorporated Organisation Registration Number: 1196519

OBJECTIVES

Charitable Purpose

The objects of Yorkshire Funders CIO are:

The promotion of the effective use of resources for charitable purposes by charitable and non-charitable bodies in Yorkshire and the Humber for the benefit of the public by:

- providing advice and information, particularly on funding and social investment.
- promoting opportunities to facilitate cooperation and collaboration.
- providing resources and funding.
- providing training and information and facilitating the exchange of information, knowledge and experience.
- enabling funding organisations to provide support and funding more effectively.

Yorkshire Funders' constitution is of a Charitable Incorporated Organisation with voting members other than its charity trustees.

Aims & Public Benefit

Yorkshire Funders provides opportunities for local funding organisations of all sizes and from all sectors to think, share, learn and act together in order to be more effective and boost their impact on Yorkshire people and places.





ACHIEVEMENTS

In our third official membership year, Yorkshire Funders continued to develop as a convening organisation - growing not just in membership numbers, but also in the breadth of our offering to those members, in reach, and in influence within the wider VCSE sector.

84 grant-making organisations became Yorkshire Funders' members in our third official membership year, 15% more than the 73 members reached in 2024/25.

As a network, we recognise the contribution of funders of all types to the Yorkshire funding community and are proud that our membership is varied, encompassing differing funder types and sizes. Our network is all the richer for its breadth of members including:

- INDEPENDENT TRUSTS AND FOUNDATIONS
- COMMUNITY FOUNDATIONS
- CORPORATE FOUNDATIONS
- LOCAL AUTHORITY & PUBLIC SECTOR MEMBERS
- INFRASTRUCTURE SUPPORT ORGANISATIONS
- PROFESSIONAL SUPPORT BUSINESSES & INDIVIDUALS

Yorkshire Funders

The Postlethwaite Music Foundation

Member Case Study

About the Member Organisation

The Postlethwaite Music Foundation is a grant-making trust established in 2015 by Ruth Holmes in memory of her mother's family and is funded through an endowment from the estate of Alan Postlethwaite. The foundation's aim is to encourage a larger number of people to benefit from music. The foundation typically provides small grants of £1,000 to small (with an income of under £150,000/year) exclusively music-focused charities working in England and registered with The Charity Commission for England and Wales.

Ruth and Mike Holmes, both trustees of The Postlethwaite Music Foundation, sat down with Yorkshire Funders to explore how membership has supported them in their grantmaking.

Why did you join Yorkshire Funders?

We first became involved with Yorkshire Funders in 2018, when it was still a more informal forum. We were drawn to it for several reasons: we have a family connection to the area, we already had a number of grantees in Yorkshire, and events in Yorkshire were often easier for us to attend than those in London. We decided to formally become members because we wanted to connect with other funders, learn from our peers and stay informed about regulatory and legal updates.

What do you value most about being a member of Yorkshire Funders?

We really enjoy being part of Yorkshire Funders. As a small foundation without any paid staff, it gives us access to expertise and a peer network from whom we can learn, while also sharing our own insights. We use the webinars and events as an opporunity to create space, step back from day-to-day operations and reflect on what we do and how we do it. We always come away feeling reinvigorated and more often than not with practical ideas to improve our grantmaking.

Being part of Yorkshire Funders also helps reduce the isolation that can come with being a very small foundation. We value the mix of funders within the network because it helps us understand the wider funding landscape and consider how broader changes may affect both our grantees and our foundation.

Yorkshire Funders

The Postlethwaite Music Foundation

Member Case Study

The monthly newsletter is useful for the same reason: it brings sector news together in one place. We look forward to reading it every month - and we by no means read all the newsletters we sign up to! The regional insight we gain through Yorkshire Funders is also valuable. For example, through research shared by Yorkshire Funders, we learned that East Yorkshire has relatively low levels of grant funding available for the arts, so we now try to ensure we are supporting work in that area.

How has your membership influenced your grantmaking?

Our membership of Yorkshire Funders has really shaped how we approach grantmaking. Through Yorkshire Funders, we learned about IVAR's Open and Trusting grantmaking approach, which we subsequently signed up to. As a result, we now offer unrestricted funding and multi-year grants.

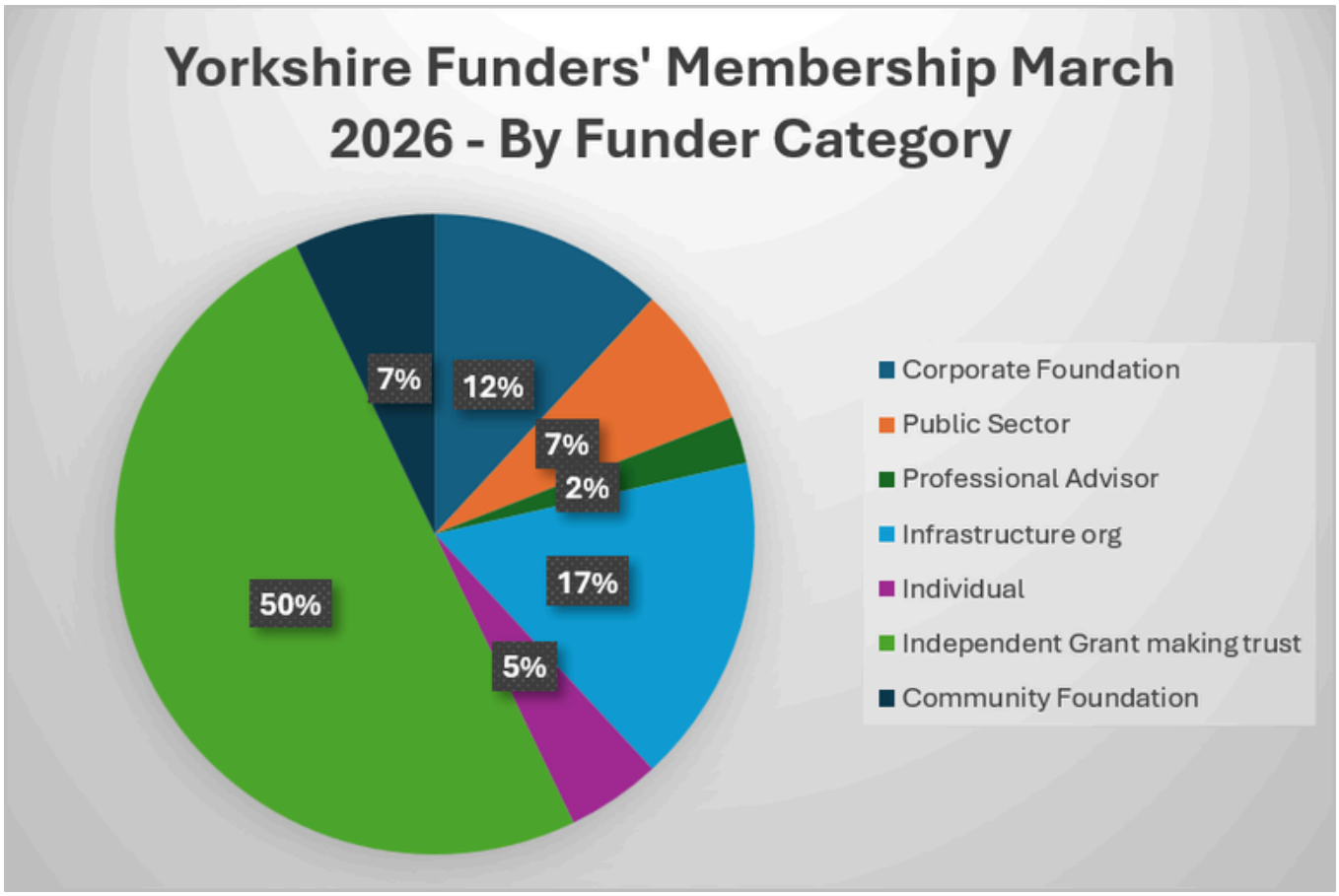
Training offered by Yorkshire Funders also led us to think carefully about how we support the charities applying to us for funding to ensure that we do not overburden them. To this end, we introduced a two-stage application process, beginning with an informal conversation to check eligibility before applicants spend time writing a full application. Where an application does not progress to the second stage, we signpost applicants to tools that can help them find other funders. This change has been well received by the organisations that apply to us: one applicant recently described it as a "kind thing to offer in a sea of unresponsive trusts".

Through our membership, we have also been prompted to reflect more closely on our policies and processes. One early practical change was moving from cheques to online payments for grantees. Later, after hearing about 360Giving at a Yorkshire Funders webinar, we signed up and found that the process helped us streamline some of our own administration.

What would you say to other funders thinking of joining Yorkshire Funders?

Yorkshire Funders is such a welcoming and enjoyable network. The team creates supportive, constructive spaces where funders can think critically about their own practice, learn from experts in the field and hear from the experiences of their peers. We always come away from events full of ideas and feeling reinvigorated. We think every funder should join!

ACHIEVEMENTS



Members have continued to be highly engaged in Yorkshire Funders' programme of activities and continue to provide overwhelmingly positive feedback on the charity's activities, including offering suggestions for future training, which are welcomed.

In the charity's annual satisfaction survey, 71% of members rated their membership as being highly valuable, with the remainder rating it as quite valuable. This is the highest percentage approval rating that we have received to date.

"The network offers a brilliant programme of relevant activity, delivered to a high standard."

"There is no other forum like it and you can network with people across Yorkshire. Great for learning, making new contacts and being part of a wider discussion about grant giving with like-minded people."

ACHIEVEMENTS

We continue to lean on our members as a source of ideas and content for both training sessions and webinars and they remain at the forefront of our future strategic direction - what they see on the ground is reflective of current trends, barriers and opportunities. They also possess particular areas of expertise which other funders welcome the opportunity to tap into.

Yorkshire Funders increased its income from £49,075 in 2024/25 to £76,862 in 2025/26, enabling the charity to increase the range and scope of events held during the year and launch new member-centred networks, to foster increasing collaboration.

With our Associate Director, Jan Garrill, moving towards retirement during the year, the charity was pleased to recruit Anjelica Finnegan to replace her moving into the year 2026/27. The number of applications of an extremely high quality that we received for the role was a notable reflection of the high standing in which Yorkshire Funders is held, with many applications, including Anjelica's, received from candidates who were themselves working for member organisations.

PROGRAMME OF ACTIVITY

Our core work comprises four main activities:

1. **Regular training, webinars and member forums**
2. **Our marquee Annual Conference and autumn Members' Day**
3. **Regular communication via newsletter and website**
4. **Developing partnerships, collaborations and influence**

All of our activities above are funded through a combination of:

- **Membership fees**
- **Corporate sponsorship**
- **Core support from members**
- **Income from events and training**

Yorkshire Funders

Member Case Study

ERIC WRIGHT CHARITABLE TRUST

About the Member Organisation

The Eric Wright Charitable Trust is an independent UK grant-making charity, wholly funded by the Eric Wright Group. The trust was established by Eric Wright in 1990, in the belief that the role of business in society is not to create wealth for the few but rather to help in building a strong community. In fulfilment of this belief, Eric gifted his entire shareholding to the trust to make it the sole owner of the Eric Wright Group.

The trust focuses on supporting young people and older people. Their grants focus primarily in areas that reflect the group's origins and roots - Lancashire, Greater Manchester and South Cumbria. Over the last ten years, the trust has distributed £19million to 282 organisations across 905 grants.

Yorkshire Funders sat down with Emma Goldthorpe, Head of Finance and Governance at the trust, to discuss how being a member of Yorkshire Funders has helped to shape their grantmaking.

What motivated the Eric Wright Charitable Trust to join Yorkshire Funders?

We heard about Yorkshire Funders through word of mouth - we were chatting to another funder, Francis Scott Trust, and they encouraged us to join. At that time, we were on a mission to speak to other funders so that we could understand how they were operating and see what we could learn from them. Yorkshire Funders provided exactly that opportunity, so we joined as members three years ago and haven't looked back.

What do you find most useful about your Yorkshire Funders membership?

I can genuinely feel the passion of the Yorkshire Funders team. You have created such a welcoming environment that invites ideas and gives funders the space to learn from one another.

Yorkshire Funders

Member Case Study

ERIC WRIGHT CHARITABLE TRUST

If members raise a particular topic or issue, you know that Yorkshire Funders will respond - whether that means setting up a task force to explore it or bringing in experts to deliver a webinar and help funders identify solutions.

For me, Yorkshire Funders feels like it holds up a mirror to our practice. It gives us the opportunity to see what we are doing well and where we might be able to improve. It's like having a consistent barometer that helps us understand where we are. Importantly, it never feels competitive; it feels supportive.

The monthly newsletter is a great example of the opportunities for learning that Yorkshire Funders provide. It gives a really helpful, sector-wide update, and opens my eyes to trends, debates and best practice that I might otherwise not have the opportunity to consider. It gives me ideas about what we might do differently, but it has also reassured me when we are doing things well.

I also really value having access to larger, national grantmakers through the network. When we first joined Yorkshire Funders, we only had two part-time members of staff, so we didn't have the time to carry out the kind of research that larger funders might be able to. Being able to learn from them and hear about their approaches and practice has been incredibly helpful. Yorkshire Funders gives us access to that knowledge and experience without needing the resources to generate it ourselves.

That breadth of insight and the quality of support and conversations are why, for me, Yorkshire Funders has to be in our budget every year. Without membership, we would be missing out on so much intelligence, learning and thoughtful discussion that I think it would be detrimental to our overall practice if we were no longer part of the network.

How, if at all, has your involvement with Yorkshire Funders influenced your organisation's approach to grantmaking?

We had heard about IVAR before joining Yorkshire Funders, but it was through our membership that we had the opportunity to meet the IVAR team and learn

Member Case Study

ERIC WRIGHT CHARITABLE TRUST

more about their Open and Trusting grantmaking approach. We have now signed up to the eight commitments, and this has had a real impact on our practice. Where we previously prioritised project funding, we now offer multi-year, unrestricted funding.

Being part of Yorkshire Funders also made it easier to have those conversations with our trustees. We were hearing from funders in the network who were already offering unrestricted funding, so I could point to their experiences and show that this approach was already being adopted by others. That gave our trustees greater confidence to make the change.

We have also started offering tailored feedback to unsuccessful applicants, something we learned through Yorkshire Funders and IVAR that grantees really value. It is another example of how being part of the network has helped us turn ideas and learning into practical changes to the way we work.

Perhaps most importantly, Yorkshire Funders has helped us to put a name to what we do. We have always been a relational funder - that is, we meet the organisations we fund and build a relationship with them - but being part of the network has helped us recognise and articulate this as an approach. We can now talk about relational funding with our trustees and company employees and explain why it's important that we work this way.

What would you say to a funder thinking of joining Yorkshire Funders?

I'd say: they're great, just do it!

PROGRAMME OF ACTIVITY

Events and Training

2025/26 featured a packed programme of 33 events, combining learning, networking and continuing professional development. Our summer Annual Conference in Leeds was once again the highlight, bringing together over 120 delegates from funding organisations across the region and the wider North for a day of learning and networking in sun-drenched Leeds. In just its second year, our November Members' Day in Sheffield was also well attended, designed to allow delegates more time and space for collaborative work and learning within sub-regional groups.

Training and webinar programmes included specific areas of training around grantmaking designed to upskill funders and trustees, as well as general topical discussions led by experts in the field, promoting best practice, process improvements and considering trends from within the sector.

Many of the sessions held stemmed directly from feedback from members, and many members also helped to deliver webinars in areas where they had particular expertise and could promote best practice through peer learning. Yorkshire Funders continued to bring in VCSE experts to deliver topical, thought-provoking training, both online and in person. Online events were free for members as a benefit of membership and in-person training remained keenly priced, with member- and non-member rates offered.

We are grateful to Wrigleys LLP, Quilter Cheviot and RBC Brewin Dolphin who provide their board rooms free of charge for many of our training sessions. This allows us to offer members good venues within our goal of events being affordable for all funders.

The charity continued to request feedback after every training session, helping to inform our future events programme and develop the sessions offered. Resources shared in sessions are uploaded to the members' area of Yorkshire Funders' new website, and we now have a space to upload webinar recordings for members to review at a later date.

PROGRAMME OF ACTIVITY

Events Held in 2025/26

8th April 2025	Reviewing Your Investment Policy	Online webinar
30th April	Fundamentals of Running a Small Charitable Trust	In person
6th May	Be a Better Grants Assessor	In person
13th May	South Yorkshire Forum	Online
21st May	SORP Consultation with BHP	Online webinar
5th June	Fundamentals of Investments and Endowments	In person
19th June	Annual Conference	In person
24th June	Corporate Foundations Network	In person
25th June	What Does Good Charity Closure Look Like?	Online webinar
8th July	Safeguarding	In person
17th July	Getting Funding to Social Enterprises	Online webinar
19th August	Using Giving is Great for Smarter Funding Decisions	Online webinar
11th September	Modern Grantmaking	In person
18th September	Funding Environmental Work	Online webinar
29th September	South Yorkshire Forum	Online
7th October	Public Sector Forum	Online
9th October	NPC MEL Workshop	Online webinar
16th October	Be a Better Grants Assessor	In person
22nd October	North Yorkshire Forum	In person
4th November	Members' Day & AGM	In person
11th November	Understanding Applicant Finances (Introductory)	In person
18th November	Understanding Applicant Finances (Advanced)	In person
19th November	Using Open Grants Data to Support your Work	Online webinar
20th November	Humber Funders Forum	In person
2nd December	South Yorkshire Forum	Online
3rd December	IVAR - Open and Trusting Grantmaking	Online webinar
4th December	Chairs and Trustees Networking	In person
8th December	Corporate Foundations Network	In person
20th January 2026	Unlock The Power of Funder Plus	Online webinar
12th February	Is It Time To Modernise Your Grant Forms?	Online
26th February	Helping Funders to Measure what Matters	Online
5th March	Be a Better Grants Assessor	In person
18th March	Diversify your Trustee Board	Online

Members attending training, webinars, forums and events in 2025/26:

Webinars	208
In-person training	93
NEW - Forums and networks	127
Annual Conference	124
Members' Day	44

MEMBER COMMUNICATIONS

Monthly Sector News Update

The Yorkshire Funders monthly newsletter has remained popular with members, receiving very high open rates of 45-55%. Carefully curated to keep funders' fingers on the pulse, Yorkshire Funders' newsletters are packed full of updates, trends, policy information, events and training opportunities, sourced from influential third sector organisations including NCVO, PBE, IVAR, NPC, Joseph Rowntree Foundation, Centre for Social Justice and ACF.

Website

www.yorkshirefunders.org.uk

With the charity continuing to grow and increase the scope of its activities, it was felt that Yorkshire Funders had outgrown its original website and a new website was designed and launched in 2025/26.

One of the key new areas of functionality for the website was the creation of a secure Members' Area, intended to be a more secure repository for sensitive information, as well as hosting a searchable members' database with information on member activities. The charity is also now able to record and post webinars onto the website for members who may not be able to attend a session to view at a later date.

Yorkshire Funders also wanted its new website to better highlight the work of some of its members, with a new 'Funders Stories' section of member achievements and case studies.

LinkedIn

Yorkshire Funders continued to be active on LinkedIn and to build an online network within the sector, sharing member news, articles and events of interest.

Yorkshire Funders

Member Case Study

About the Member Organisation

Northern Powergrid Foundation was created in 2022 in response to Storm Arwen, to help communities become more resilient during emergencies. Thanks to a £7.57m donation from Northern Powergrid (Northeast) plc and Northern Powergrid (Yorkshire) plc, they have supported over 120 organisations with energy resilience projects. Today, the foundation exists to help communities in the North East, North Lincolnshire and Yorkshire turn their energy challenges into opportunities. This will mean different things to each community. Whether it's preparing for future energy needs or helping communities stay safe and connected during tough times, they're proud to fund and stand alongside those making a positive impact to the people living and working in their area.

Yorkshire Funders sat down with Jess Cook, Head of the Northern Powergrid Foundation, to talk about how membership has supported the foundation's practice.

What motivated you to join Yorkshire Funders?

I was the first Head of Foundation and was new to grantmaking, so it was important for me to find a network where I could build not only my knowledge of grantmaking, but also my understanding of the regions in which we fund, including Yorkshire. I came across Yorkshire Funders while searching for a regional network and was drawn to the range of opportunities to connect with other funders and share learning through webinars, in-person training and events.

What do you find most useful about your Yorkshire Funders membership?

In the early days of my membership, it was the training that I found most useful. I joined a session on how to run a small grant-making trust, facilitated by Carla Marshall and Jan Garrill. It was fantastic and incredibly informative. It encouraged me to think about grantmaking in a different way, and the learning from that session directly shaped our grants programme.

Member Case Study

The webinars and annual conference also really make me think critically about the work of the foundation, what we do and how we operate. I hope that, over time, I will also have opportunities to collaborate with other funders and learn from their experiences.

I particularly enjoy being part of the Corporate Foundations Network. Being a corporate foundation has its own challenges and differences compared to other funders, and having a supportive space to connect with other organisations managing these and asking similar questions is both enjoyable and incredibly helpful.

How, if at all, has your involvement with Yorkshire Funders influenced your organisation's approach to grantmaking?

We benefitted from bespoke support and training from Yorkshire Funders on assessing grants and reading accounts, and this directly shaped our processes. For example, we developed a scoring matrix to help us assess grant applications as consistently and objectively as possible.

It was also through Yorkshire Funders that I first learned about 360Giving. Hearing about their work challenged me to think about how we could make Northern Powergrid Foundation's grantmaking more transparent. I reached out to Katherine and the team at 360Giving, who supported us to publish our data with them.

I was really pleased to then have the opportunity to share our experience of signing up to 360Giving through a Yorkshire Funders webinar. It really feels like a network where you can give back and share your own insights and experiences, as well as learn from others.

How do you think your learning from Yorkshire Funders has benefitted the organisations that you fund?

One of the key lessons from the initial training was the importance of proportionality, particularly

Member Case Study

in what we ask for at the application and reporting stages. We have now split our application process so that applicants first submit an expression of interest. This gives us an opportunity to check their eligibility before inviting eligible applicants to submit a full application.

We have found that this saves grantees time and makes it easier for them to engage with us. We are focused on only asking for information that we genuinely need.

Under our new strategy, we are offering our first multi-year grants, and a new small grants programme. We learned both about the importance of multi-year funding and how to implement it in the context of small grants through conversations with fellow funders including Sir George Martin Trust and Leeds Building Society Foundation. We also learned about IVAR's Open and Trusting grantmaking approach, which emphasises the importance of multi-year and flexible funding.

We wouldn't have had these insights, or the opportunity to have these important conversations, without Yorkshire Funders.

How would you describe the value of Yorkshire Funders to another funder considering joining the network?

Yorkshire Funders is always there when you need additional support, advice or insight, and, frankly, the membership represents incredibly good value for money.

Yorkshire Funders has created a space where funders feel able to be open and honest with one another, exploring issues in depth without judgement and in a way that genuinely fosters learning. Being a funder can sometimes feel like a lonely place, particularly when you are part of a small team.

If you are someone who works for a funder, or are a trustee of one, and are looking for a network of peers who understand grantmaking and care deeply about Yorkshire and the commuities they fund, then, in my opinion, Yorkshire Funders is the network for you.

PARTNERSHIPS & COLLABORATION

Corporate Partners

The charity was incredibly grateful for the continued support of both McInroy & Wood and Wrigleys LLP as sponsors in 2025/26. Yorkshire Funders also welcomed SmartyGrants as new technology sponsors during the year.

These three sponsors provided vital financial support to help foster the charity's ongoing growth. We view our sponsors as partners and promote their activities to members through webinars and in-person events, as well as via our website and other member communications.

Yorkshire Funders is also grateful for the kind use of free training facilities at Wrigleys LLP, Quilter Cheviot and RBC Brewin Dolphin, saving the charity valuable funds.

Funder Financial Support

Continuing more than 30 years of previous staffing and resource support from the Sir George Martin Trust, the charity was grateful to receive a £5,000 grant from the trust for the 2025/26 year. Following their initial support in 2024/25, BRELMs Trust also continued to support Yorkshire Funders in 2025/26 with a £5,000 grant, as did R.E. Chadwick with a £2,000 grant.

These grants help to support Yorkshire Funders in its continued growth as it seeks further future sources of income, and the charity wishes to put its sincere thanks to these organisations for their continued support on the record.

PARTNERSHIPS & COLLABORATION

Aligned Working Network

The Aligned Working Network continued to be well attended with two online meetings in September 2025 and March 2026. The Common Initiatives, Communities of Practice and how funders can help the frontline more were focus areas for discussion. Two new collaborative task forces emerged from the group this year - the Common Report Form (CRF) Task Force and Common Due Diligence Task Force - due to Yorkshire Funders' member and frontline charity/group requests.

ASDA Foundation, Leeds Community Foundation, Sheffield University and Sir George Martin Trust all kindly agreed to join the CRF Task Force, developing a new form which was then tested with a focus group of frontline groups in October. The CRF was launched in January 2026 and resulted in online coverage on ACF's Funders Collaborative Hub.

Yorkshire Funders worked closely with Dr. Katy Adams of Sheffield University who wrote a report on the Common Application Form (CAF), which included interviews with some CAF adopters as well as getting her paper on the subject published in the Journal of Philanthropy. The team also planned the first Common Due Diligence Task Force meeting which will take place in June 2026.

Sub-Regional and Thematic Forums

The creation of sub-regional and themtic forums was an area of focus for the charity in 2025/26. Following the success of the South Yorkshire Funders Forum, originally set up by South Yorkshire's Community Foundation, Yorkshire Funders established sub-regional forums for both York & North Yorkshire, and Humber in 2025/26, with a West Yorkshire forum planned for 2026/27. These forums were well attended during the year and have fostered an environment of increased collaboration, as well as welcoming engaging speakers.

PARTNERSHIPS & COLLABORATION

Corporate Foundation and Public Sector Networks were also established, offering funders from organisations with similar operations, opportunities and challenges the chance to collaborate and share best practice.

All forums, whether online or in person, were set up to be free of charge to attend and open to both members and non-members, in the hope that some non-members attending may become more familiar with the work of the charity and, in time, join as full members.

Membership Scheme

During 2025/26, the Yorkshire Funders team continued to build relationships with funders outside the network, reaching 84 members by March 2025. As in 2024/25, more new members have also joined the charity from the wider North, from areas such as the Northeast and Lancashire, and they are most welcome.

Membership fees ranged from £99 per annum for small organisations (making grants of under £100k in the year) to £405 for organisations making grants of over £500k per annum.



PLANS FOR THE FUTURE

For 2026/27 and for the next two years, the focus will be on our four strategic goals, as agreed by the trustees in 2024/25 and reviewed regularly:

1. **Growing our membership**
2. **Bringing people together to support greater funder collaboration.**
3. **Sharing and advocating for best practice in funding, with more members signed up to good practice activity like IVAR Open and Trusting, placing their data on 360Giving and addressing the need for greater trustee diversity.**
4. **Working together to drive positive change for the region - becoming the 'go to' advocate for philanthropy in our region and recognised for the collective insights and funding the network can deliver.**

We will aim to achieve this in 2026/27 by:

- Identifying opportunities for funders to develop areas of practice they haven't had capacity to explore before - this includes a pilot project with IVAR, funded by Local Trust, to pilot resident-led, hyper-local grantmaking with Yorkshire Funders' members looking to start or develop participatory grantmaking
- Maintaining a diverse and interesting range of webinars and training days as well as using our Annual Conference and Members' Day face-to-face events to provide challenge and inspiration.

PLANS FOR THE FUTURE

- Supporting the Aligned Working Network with its continued promotion of the Common Application and Report Forms as well as its ongoing work around common due diligence approaches.
- Enhancing our offer to members through increasing thematic and geographic networks where longer term trust and collaborations might emerge.
- Developing stronger partnerships with representatives of funded groups so that we can share their insights back to funders to help inform practice.
- Determining the optimum approach to mapping and sharing data on activity and need in our region.
- Building partnerships with key national organisations working in the funder space - e.g. IVAR, Centre for Social Justice, PBE, NPC, CAST, 360Giving, Funders Together and Funder Safeguarding Collaborative, so that we can bring their insights and expertise into the network.

To deliver this, we will need to build a diverse and steady income stream from membership, events and sponsorship, as well as from core supporters within our network. Any surplus from 2025/26 funds will be carried over to go towards staffing and running costs.

GOVERNANCE & MANAGEMENT

Trustee Roles and Responsibilities

Yorkshire Funders is governed by a voluntary board of nine trustees who are collectively responsible for the charity's strategic direction, financial oversight and legal compliance. Trustees ensure that our work aligns with our mission and values, and that we operate transparently, sustainably and effectively.

Our trustees bring a wide range of experience and insight and work closely with staff and consultants to shape and monitor Yorkshire Funders' activities. All are active or recent past trustees or senior leaders of funding organisations in the region. They meet formally four times a year, with additional meetings as needed, and contribute actively to events, decision making, and key areas such as finance, policy and governance.

We hold our Annual General Meeting at the close of our Members' Day in the autumn and welcome questions and discussions with members about past performance and future plans.

Trustees are in effect appointed for three-year terms which are renewable up to three consecutive terms. At each AGM our constitution requires a third of trustees to resign and they can be reappointed for a maximum of three consecutive terms. Succession planning is regularly reviewed to ensure a strong mix of skills and perspectives. The role is unpaid, although reasonable expenses are reimbursed.

Commitment to Equality, Diversity and Inclusion (DEI)

Yorkshire Funders is committed to both the organisation and its trustee board reflecting the diversity of Yorkshire, the people who live here and the communities our members fund. As the charity develops, it is important that the trustee board is made up of a range of different people which reflect its members and the Yorkshire region.

Yorkshire Funders will work to ensure that every individual on the trustee board and all consultants have equal opportunities by being conscious of and actively challenging bias or prejudice, to make sure no one is treated less favourably because of who they are or what makes them different from other people.

GOVERNANCE & MANAGEMENT

We recognise we are all different in many ways and all should have equitable access to resources and decision making at Yorkshire Funders. We are proactive in making sure people of different backgrounds, experiences and identities feel welcomed, respected and fully able to participate and we aim to not only create a diverse environment, but also to ensure that a culture exists where individuals can be their true selves.

Recruitment, Induction and Training of New Trustees

The Board keeps the skill requirements for the trustee body under review. Any recruitment of new trustees is promoted amongst the Yorkshire Funders membership and dialogue with interested parties is overseen by the Associate Director prior to interview by existing members of the trustee board.

The Associate Director or Administration Officer ensures that each new trustee is provided with the Trustee Guide, the Charity Commission's Essential Trustee document and will provide telephone, Zoom and in-person support as required. Taking part in Yorkshire Funders events and training sessions ensures ongoing training and professional development for each trustee.

As part of our continuous review to ensure our trustee board is representative of our membership and offers a broad range of skills and viewpoints, we recruited three new trustees in June 2026 to add to the six already on our trustee board.

Sustainability Statement

Yorkshire Funders is committed to operating in a way that is environmentally responsible and socially conscious. Our day-to-day operations remain low impact: we work remotely, keeping travel to a minimum and avoiding the need for a physical office, while paper use is limited across all activities. The majority of our events are held online, which not only increases accessibility but also reduces carbon emissions.

For in-person gatherings, we make deliberate choices to use charitable or community-owned venues, sourcing catering from charitable or social enterprise providers.

PUBLIC BENEFIT STATEMENT

The Directors of the CIO have considered the general guidance on public benefit issued by the Charity Commission in carrying out its objectives and activities and in delivering public benefit to the many institutions provided with financial and general help and are satisfied that the objectives fall under the provisions of the Charities Act 2011.

FINANCIAL REVIEW

Reserves Policy
The trustees agreed that the charity should generally aim for three to six months' unrestricted expenditure in reserves. It should be noted that the fund balances recorded below are immediately following the membership renewals period, when these fund balances are at their high point.

Membership fees
The membership fees for 2025/26 were maintained at similar levels to the previous year, with only a 5% increase from 2024/25.

Summary of fund balances at 31st March 2026:

Unrestricted: £48,831
Restricted: £0

Commitments
The trustees had made no commitments to future capital purchases, nor given any guarantees, at the balance sheet date.

Approved by the Board of Trustees on 3rd September 2026 and signed on their behalf by:



Tim Cutts
Chair

STATEMENT OF TRUSTEES RESPONSIBILITIES

The trustees of Yorkshire Funders are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England & Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping sufficient accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.
The trustees are responsible for the maintenance and integrity of the charity and financial information included on the charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

CHARITY COMMISSION FOR ENGLAND AND WALES

Yorkshire Funders			Charity No (if any)	1196519	
Annual accounts for the period					
Period start date	01/04/2025	To	Period end date	31/03/2026	

Section A Statement of financial activities

Recommended categories by activity	Guidance Notes	Unrestricted funds £ F01	Restricted income funds £ F02	Endowment funds £ F03	Total funds £ F04	Prior year funds £ F05
Incoming resources (Note 3)						
Incomeand endowments from:						
Donations and legacies	S01	58,659	-	-	58,659	38,690
Charitable activities	S02	18,203	-	-	18,203	10,385
Other trading activities	S03	-	-	-	-	-
Inv estment s	S04	-	-	-	-	-
Separate material item of income	S05	-	-	-	-	-
Other	S06		-	-	-	-
Total	S07	76,862	-	-	76,862	49,075
Resources expended (Note 6)						
Expenditure on:						
Raising funds	S08	6,661	-	-	6,661	5,953
Charitable activities	S09	65,399	-	-	65,399	51,193
Separate material item of expense	S10	-	-	-	-	
Other	S11	-	-	-	-	-
Total	S12	72,060	-	-	72,060	57,145
Net income/(expenditure) before investment gains/(losses)	S13	4,802	-	-	4,802	- 8,070
Net gains/(losses) on investments	S14	-	-	-	-	-
Net income/(expenditure)	S15	4,802	-	-	4,802	- 8,070
Extraordinary items	S16	-	-	-	-	
Transfers between funds	S17	-	-	-	-	-
Other recognised gains/(losses):						
Gains and losses on revaluation of fixed assets for the charity's own use	S18	-	-	-	-	-
Other gains/(losses)	S19	-	-	-	-	-
Net movement in funds	S20	4,802	-	-	4,802	- 8,070
Reconciliation of funds:						
Total funds brought forward	S21	44,029	-	-	44,029	52,099
Total funds carried forward	S22	48,831	-	-	48,831	44,029

Charity Name: Yorkshire Funders	Charity No	1196519
	Company No	
Annual accounts for the period	Period start date: 01/04/2025	To period end date: 31/03/2026

SectionB Balance sheet

		Guidance note	Unrestricted funds £	Restricted income funds £	Endowment funds £	Total this year £	Total last year £
			F01	F02	F03	F04	F05
Fixed assets							
Intangible assets	**(Note 15)**	B01	-	-	-	-	-
Tangible assets	**(Note 14)**	B02	245	-	-	245	367
Heritage assets	**(Note 16)**	B03	-	-	-	-	-
Investments	**(Note 17)**	B04	-	-	-	-	-
	Totalfixedassets	B05	245	-	-	245	367
Current assets							
Stocks	**(Note 18)**	B06	-	-	-	-	-
Debtors	**(Note 19)**	B07	12,585	-	-	12,585	5,960
Investments	**(Note 17.4)**	B08	-	-	-	-	-
Cash at bank and in hand	**(Note 24)**	B09	38,713	-	-	38,713	40,224
	Totalcurrentassets	B10	51,298	-	-	51,298	46,184
Creditors: amounts falling due within one year	**(Note 20)**	B11	2,712	-	-	2,712	2,522
	Net current assets/(liabilities)	B12	48,586	-	-	48,586	43,662
	Total assets less current liabilities	B13	48,831	-	-	48,831	44,029
Creditors: amounts falling due after one year	**(Note 20)**	B14	-	-	-	-	-
Provisions for liabilities		B15	-	-	-	-	-
	Totalnetassets orliabilities	B16	48,831	-	-	48,831	44,029
Funds of the Charity							
Endowment funds	**(Note27)**	B17	-			-	-
Restricted income funds	**(Note 27)**	B18		-		-	
Unrestricted funds		B19	48,831		-	48,831	44,029
Revaluation reserve		B20				-	
Fair value reserve		B21					
	Total funds	B22	48,831	-	-	48,831	44,029

The company was entitled to exemption from audit under s477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act with respect to

These accounts have been prepared in accordance with the provisions applicable to small companies subject to the small companies regime and in accordance with FRS102 SORP.

Signed by one or two trustees/directors on behalf of all the trustees/directors	Sign/Print Name	Date of approval dd/ m m / yyyy
	P T Cutts	03/09/2026
	P.T. Cutts	

YORKSHIRE FUNDERS

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF

YORKSHIRE FUNDERS

I report to the trustees on my examination of the accounts of Yorkshire Funders (the charity) for the year ended 31st March 2026.

Responsibilities and basis of report

As the charity trustees of the charity 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 Trustee'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 Commissioner under section 145(5)(b) of the 2011 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:

(1) accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
(2) the accounts do not accord with those records; or

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.

Nigel Everard BA FCA
Hunter Gee Holroyd
Club Chambers
Museum Street
York YO1 7DN

Date 22/09/26