



**THE ASSOCIATION FOR PROMOTING RETREATS**  
**TRUSTEES' REPORT**  
**FOR THE YEAR ENDED 31ST MARCH 2023**

**Reference and administrative details of the charity, its trustees and advisers**

**The Association for Promoting Retreats** will throughout this report and accounts be referred to as **(the) APR**. The charity registration number is **222458**.

**Principal address:** c/o 5 Glebe Park  
Balderton  
Newark  
NG24 3GN

**Telephone number:** 01636 555085

**Email and internet addresses:** Email: [promoting.retreats@gmail.com](mailto:promoting.retreats@gmail.com)

Website: [www.promotingretreats.org](http://www.promotingretreats.org)

**The Trustees at the date of this report are:**

Revd Carol Smith (elected Jan 2018)	Mr Stewart McCredie (elected Sept 2017)
Revd Alison Christian (elected Jan 2018)	Revd Cameron Butland (elected Apr 2021)
Ms Susan Parker (co-opted annually)	Revd Nicholas Buxton (elected Oct 2019)

No Trustee receives any remuneration from the charity.

**The Officers who served during the year are:**

President	Rt Reverend John Stroyan
Chair	Revd Carol Smith
Vice Chair	Revd Alison Christian
Treasurer	Ms Susan Parker
Secretary and Administrator	Dr Demelza Henderson

**Advisers:** Bankers Lloyds Bank PLC  
98 Victoria Street  
London SW1E 5JL

Independent Examiner Rachel Rudkin FCCA  
Duncan & Toplis  
14 London Road  
Newark  
Nottinghamshire  
NG24 1TW

### **Structure, governance and management:**

The Association for Promoting Retreats (APR) is a charity registered with the Charity Commission for England and Wales, number 222458. The charity is not required to be registered with the Office of the Scottish Charity Regulator or the Charity Commission for Northern Ireland. The APR is an unincorporated association established under a trust deed in 1913. After various prior amendments a replacement Constitution was adopted in November 2012, followed by amendment by resolution of one minor administrative detail in October 2013.

The policy and general management of the affairs of the APR is directed by a committee of Trustees, which meets four times a year. Trustees are elected by members and serve up to three years, being eligible for re-election for two further three-year terms. The Trustees delegate the day to day running of the charity to the Administrator. During the absence of an Administrator roles were delegated to the Trustees.

The APR is a Founder Member of the Retreat Association, a company limited by guarantee and not having a share capital and registered with the Charity Commission for England and Wales with the number 1150792. The Retreat Association also retains its previous registration as an unincorporated association under the Charity Commission registration number 328746, which continues for the purpose only of receiving future legacies.

The Retreat Association brings together the APR with other member groups working with a joint purpose to promote and encourage retreats and Christian spirituality across the denominations.

In compliance with their legal obligation, the Trustees confirm that there have been no serious incidents in connection with APR which required a report to be made to the Charity Commission.

### **Objectives and activities:**

The APR was established and still operates for the advancement of religion by promoting the development of the Christian life through retreats, in particular through the promoting of retreats within the Anglican Churches in the United Kingdom.

The Trustees have taken into consideration the guidance on public benefit issued by the Charity Commission, and, in particular, the specific guidance on charities for the advancement of religion. The Trustees consider that the work carried out by the APR, both through the Retreat Association and as an independent charity, continues to be of great public benefit in terms of religion and education. To this end, the APR works to maintain and strengthen its promotion and support for going on retreat, throughout the Church and wider society. In addition to its support of the Retreat Association, the main activities of the APR have included:

- Promoting the use of Anglican retreat houses within the Anglican Church;
- Organising conferences and meetings for Leaders and Spirituality Advisers to the Anglican Church;
- Informing members through distribution of a twice-yearly newsletter, and the annual handbook *Retreats* published by the Retreat Association;
- Supporting individuals to go on retreat who might otherwise not be able to afford it through a designated bursary fund;
- Organising retreats and other events for members and other events, using subscribers' retreat premises wherever possible;
- Providing complimentary membership of APR to those recently ordained to the diaconate and priesthood.

Further information about the APR can be found at its website, [www.promotingretreats.org](http://www.promotingretreats.org).



### **Chairman Annual Report:**

2023 has been a year of consolidation for the Association for Promoting Retreats. Trustees have had several opportunities to reflect on the charity's raison d'être, and to consider what our members (and the general public) are looking for when they connect with the APR.

Our biggest project this year has been to substantially update our website (promotingretreats.org), which had become dated and unwieldy. Indeed, we found that almost three-quarters of visitors to the site wanted only to find out about where or when to go on retreat, or to learn about the Bursary Fund. The new site is built around these findings. It is simple and easy to navigate, with everything accessible from the homepage. There is an interactive map showing the locations of all the APR member houses around the UK (and beyond), as well as an Events Calendar listing hundreds of individual retreats and quiet days offered at these houses throughout the year. Subscriptions can also be taken out, or renewed, through the site. There is also a Resources page where we will upload a flow of useful articles, newsletters, and other resources for retreat-making. I would like to offer our enormous thanks to Trustee, Revd Dr Nicholas Buxton for the long hours he gave to building the site, and to Demelza Henderson for uploading the information and maintaining it.

2023 has seen a huge upsurge in requests for retreat bursaries – indeed, we had more applications for bursaries in the first four months of this year than in any previous year in its totality. Whilst we remain committed to being able to honour as many of these applications as possible, we have had to limit the maximum bursary available to £150 per person. We rely on our member houses to assess the suitability of any individual application.

It is partly due to this, but also because our subscription income no longer covers our expenses (the wholesale price of the Retreats handbook alone has almost doubled since our last rise in subscription rates), that we will be increasing our membership fees from April 2024. The scale of these increases was laid out in our autumn newsletter, but will be between £5 and £10 depending on the category of membership.

Bookings have just opened for the next Diocesan Spirituality Advisers' Conference at Launde Abbey, and we hope once again to be able to have a good representation of advisers from across the country (in 2022, delegates from 33 (of a potential 42) different dioceses attended). Revd Ruth Harvey (from the Iona Community) and Revd Dr Susanne Carlsson (Spirituality Adviser for the dioceses of Canterbury and Rochester) will be our main speakers, and there will be opportunities for networking and discussion groups incorporated into the programme. It would be wonderful to think that all dioceses could be represented at the 2024 gathering so do spread the word!

Our President, Rt Revd John Stroyan, retired from his role as Bishop of Warwick in July, but we are very grateful that he wishes to continue to support the work of the APR as he enters his retirement.

This is a good opportunity to express and record my continuing gratitude to all the APR Trustees for their commitment to the charity, including Urs Mattmann whom we recently welcomed to the Board, and of course to our Administrator, Demelza Henderson whose tireless diligence keeps us all on the straight and narrow!



**Financial Review:**

The accounts, which have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) – (Charities SORP (FRS102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) are set out on pages 6-11.

Total income of £18,427 has decreased this year compared with last year of £34,273. Total expenditure has increased to £47,261 compared with last year of £46,366. This decrease in income has occurred due to the bi annual Spirituality Advisers' Conference (SAC) not taking place this year, which incurs the majority of income and Expenditure.

The investments show an unrealised loss of £6,094 for the year compared with PY profit of £12,917. This has resulted in an overall net deficit for the year of £34,927 (2022: £824 Surplus). See notes 3 & 6 for further details.

**Approved by the Committee of Trustees and signed on its behalf by:**

The Reverend Carol Smith, Chair of the Committee of Trustees

**Dated:**

## **Independent Examiner's Report to the Trustees**

I report on the accounts of the APR for the year ended 31 March 2023 which are set out on pages 6 to 11.

### **Respective responsibilities of Trustees and 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 of the Act);
- follow the procedures laid down in the General Directions given by the Charity Commission (under section 145(5)(b) of the 2011 Act); and
- state whether particular matters have come to my attention.

### **Basis of independent examiner's statement**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes the review of the accounting records kept by the charity and a comparison of the accounts with those records. It also includes considering any unusual items or disclosures in the financial statements 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 statement**

In connection with my examination, no matter has come to my attention:

- (1) which gives 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 requirements of the 2011 Act have been met.
- (2) to which, in my opinion, attention should be drawn in order to enable the proper understanding of the accounts to be reached.

Signed:

Rachel Rudkin FCCA  
Duncan & Toplis Limited  
Chartered Accountants  
14 London Road  
Newark  
Nottinghamshire  
NG24 1TW

Dated:

**STATEMENT OF FINANCIAL ACTIVITIES  
INCLUDING INCOME & EXPENDITURE ACCOUNT  
FOR THE YEAR ENDED 31ST MARCH 2023**

<u><b>Income and Expenditure</b></u>	<b>Note</b>	<b>Unrestricted Funds 2023 £</b>	<b>Restricted Funds 2023 £</b>	<b>Total Funds 2023 £</b>	<b>Total Funds 2022 £</b>
<u>Income from:</u>					
<i>Charitable activities</i>					
-Membership subscriptions		10,775	-	10,775	11,073
-Spirituality Advisers' conference		440	-	440	11,403
-Sundries/bursary		471	-	471	4,973
-Donations and legacies		1,507	-	1,507	1,030
-Investment income		4,178	-	4,178	4,625
-NHS bursary fund		1,056	-	1,056	1,139
-Spiritual Directors		-	-	-	30
<b>Total income</b>		<b>18,427</b>	<b>-</b>	<b>18,427</b>	<b>34,273</b>
<u>Expenditure on:</u>					
<i>Expenditure on charitable activities</i>					
Direct charitable expenditure	2	39,204	-	39,204	40,586
Bursary expenditure		8,057	-	8,057	5,780
<b>Total expenditure</b>		<b>47,261</b>	<b>-</b>	<b>47,261</b>	<b>46,366</b>
Net outgoing resources for the year		(28,833)	-	(28,833)	(12,093)
(Losses)/profits on investments:					
Unrealised	3	(6,094)	-	(6,094)	12,917
Realised		-	-	-	-
Net movement in funds		(34,927)	-	(34,927)	824
Total fund balance brought forward at 1 April 2022		172,412	-	172,412	171,588
Total fund balance carried forward at 31 March 2023		<b>137,485</b>	<b>-</b>	<b>137,485</b>	<b>172,412</b>

*The attached notes on pages 7-10 form part of these accounts*



**BALANCE SHEET  
FOR THE YEAR ENDED 31 MARCH 2023**

	<b>Note</b>	<b>2023</b>	<b>2022</b>
		<b>£</b>	<b>£</b>
Fixed Assets			
Investments	3	134,162	160,256
Debtors	4	-	6,901
Current Assets			
General fund		2,516	398
Bursary fund		3,026	6,607
Cash at bank		5,542	7,005
Total Current Assets		5,542	13,905
Creditors: amounts falling due within one year	5	2,220	1,750
Net current assets		3,322	12,155
Creditors: amounts falling due after more than one year	5	-	-
Net Assets		137,484	172,411
<u>Funds</u>			
General fund		134,969	172,015
Bursary fund (designated)	6	2,516	397
		<b>137,485</b>	<b>172,412</b>

**Approved by the Committee of Trustees on .....  
and signed on its behalf by:**

The Reverend Carol Smith, Chair of the Committee of Trustees

## **1. Accounting policies**

The accounts have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) – (Charities SORP (FRS102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102).

a) Subscriptions, donations, etc.

Subscriptions, donations, and tax recoverable on payments under gift aid are accounted for when received by the APR. During the year to 31st March 2023 there were 289 full members and 173 concessionary members.

b) Investment income

Investment income is included in the accounts when received.

c) Investments

Investments are included in the accounts at market value.

d) VAT

The APR is not registered for VAT and the irrecoverable VAT is written off in the accounts.

<b><u>2. Direct charitable expenditure</u></b>	<b>2023</b>	<b>2022</b>
<u>Charitable expenditure</u>	£	£
Contributions paid to the Retreat Association	5,400	5,900
APR administrator	8,490	7,896
Publicity & website	1,276	887
Newsletters/postage	1,385	1,352
RA journal and cost of events	5,970	9,132
NHS bursary	1,649	9,985
IT software and consumables	447	186
Travelling and meetings	889	1,199
Independent examination fee	2,901	2,262
SAC Expenses	9,664	-
SAC refunds	160	-
Stationery and office expenses	973	1,787
		-
<b>Total direct charitable expenditure</b>	<b><u>39,204</u></b>	<b><u>40,586</u></b>

**NOTES TO THE ACCOUNTS  
FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2023**

<b><u>3. Investments</u></b>	<b>2023</b>	<b>2022</b>
Assets are held with The Central Board of Finance of the Church of England as follows:	£	£
Investment fund shares		
Market value at 1 April 2022	160,256	157,339
Value of shares sold in year	(20,000)	(10,000)
Unrealised investment profit/(loss)	(6,094)	12,917
Market Value at 31 March 2023	<b><u>134,162</u></b>	<b><u>160,256</u></b>
<b><u>4. Debtors</u></b>	<b>2023</b>	<b>2022</b>
	£	£
Prepayments	-	6,901
	<b><u>-</u></b>	<b><u>6,901</u></b>

**NOTES TO THE ACCOUNTS  
FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2023**

<b><u>5. Creditors</u></b>	<b>2023</b>	<b>2022</b>
	<b>£</b>	<b>£</b>
Amounts falling due within one year:		
Accruals	2,220	1,750
Donations payable	-	-
	<b>2,220</b>	<b>1,750</b>

**6. Reserves**

<b>Assets from balance Sheet</b>	<b>£</b>	<b>£</b>
General fund at 1 April 2023		134,969
Bursary fund at 1 April 2023		2,516
		<b>137,485</b>

**Planned expenditure**

Yearly cost of administration	15,000	
Running costs	50,000	
Project allocation	20,000	
		(85,000)
<b>Contingency</b>		(20,000)
<b>Surplus</b>		<b>32,485</b>

At present the Trustees consider that a surplus of around £60,000 should be maintained, and is justified because:

- It is important to maintain a year's expenditure;
- Membership income is decreasing because member numbers are declining, and the Trustees have agreed to maintain existing rates of subscription until at least 31 March 2023.
- The Trustees need to underwrite the costs of major events such as the biennial diocesan Spirituality Advisers' Conference, next taking place in April 2024.



## **NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31<sup>ST</sup> MARCH 2023**

### **7. Trustee expenses**

Trustee travel expenses totalled £889 (2022: £1,199) during the year. All trustee expenses are reimbursed when incurred.

### **8. Exceptional items**

During the year, an unrealised loss was made on investments of £6,094 (2022: Gain £12,917).