

A faith that *does* justice

JESUITS

ANNUAL ACCOUNTS 2018-2019



Provincial's Message

"Walk with the poor, the outcasts of the world, those whose dignity has been violated, in a mission of reconciliation and justice."

Fr Damian Howard SJ

IT'S JUST over a year ago that Pope Francis confirmed Fr General's discernment of the Society's four new Universal Apostolic Preferences. There has been a lot to process since then and the Jesuits in Britain and their partners in mission have been prayerfully entering into a new vision of our shared task. We know that we are called to deep conversion if we are to be able to respond to the needs of the Church and the world. It's an exciting and challenging time to be sent on mission!

As I have prayed on each of the UAPs, the one which keeps lighting up hope in my heart is the second: "Walk with the poor, the outcasts of the world, those whose dignity has been violated, in a mission of reconciliation and justice."

Since the renewal of the Society which took place after the Second Vatican Council, we have been cultivating the good and holy desire to serve Christ in the poor. It's a call which many Jesuits around the world have heard and responded to generously, sometimes

at the cost of their own lives. This year we have seen the canonisation of Archbishop Oscar Romero and look forward to the beatification of Fr Rutilio Grande SJ, two icons of solidarity with Christ's poor.

How have the Jesuits in Britain made their own that option for the marginalised and excluded? In many varied and creative ways. We work with the homeless, providing soup runs, accommodation, even health services. The Jesuit Refugee Service

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Fr Damian Howard SJ

accompanies and advocates for destitute asylum seekers in the London area. Jesuit Missions supports development projects overseas and sends volunteers to support local churches in poorer countries. Several British Jesuits in recent years have spent time at the Jesuit mission in Lahore where Christians face persecution and discrimination. Some work to strengthen the Church in the Middle East after so much suffering has been inflicted in recent years. Jesuits attend to the needs of terminally ill patients in hospices. All our parishes find themselves at the service of people with mental health problems. In Campion Hall, Jesuit doctoral students study the needs of migrants on the US-Mexican border, the endangered language of a small Indian tribal community and sustainable development projects in Latin America. Farm Street parish regularly welcomes a community of LGBT Catholics, while in Wales, outreach work from St Beuno's reaches the lives of many rural Catholics, helping to strengthen their faith and turn them into multipliers in the local church.

One special way in which we walk with those who have suffered in recent years is the care we take of victim-

survivors of abuse. We take no pride in this. It is a moral imperative for a religious order in today's world. I am pleased that after years of preparation we have managed to launch a project in Glasgow to reach out to victim-survivors in a way that respects their privacy and feelings.

We are co-sponsoring a project at the University of Durham which looks at how Church culture and theology might have made abuse and cover-up possible. We are actively supporting a project in the Wimbledon area to give spiritual and psychological support to victim-survivors. And we are working on a specifically Jesuit framework for approaching safeguarding. All this in addition to the normal efforts we make to keep young people and vulnerable adults safe and to deal with historical cases of abuse.

And what of the planet Earth which we modern human beings also routinely mistreat and damage? This year we are divesting from fossil fuels companies. We have started as a Province seriously to reflect on our lifestyle, our diet, energy use, travel arrangements and more, with the aid of a resource booklet produced by two of our younger Jesuits, and which is now available on social media.

But private choices alone will not suffice to save us from our current self-destructive trajectory. Pope Francis has pointed us towards the need for deep conversion of heart so that the whole world can find a new lifestyle which is just, sustainable and expressive of our reconciliation with God and creation. It's that commitment to deep spiritual transformation and to dialogue with the sciences, with the arts and with cultures and religions which marks the Jesuit contribution to the great challenge that lies before us: the fostering of a genuine integral human development.

Pope Francis, in his exhortation to the Church of the Amazon, offers his dreams as a source of energy and inspiration. The Jesuit adventure began nearly five hundred years ago in 1521 when a young, Basque nobleman lay daydreaming on his bed of convalescence, and noticed out of the corner of his spiritual eye that God was up to something in his life. Maybe that's how the Spirit will take us again in 2020 as we ask God that we might serve Him as he deserves to be served, without counting the cost. □

Jesuits in Britain

Mission and Aims

The Jesuits (also known as the Society of Jesus) are an international religious order of men within the Catholic Church. The Order was founded in 1540 by St Ignatius of Loyola and his nine companions. Today it numbers over 15,000 men in more than 100 countries. The British Province, which operates in England, Scotland and Wales is one of over 80 provinces worldwide.

OUR MISSION today is the ministry of reconciliation with God, with one another and with creation.

Our aims are to:

- Promote discernment and the Spiritual Exercises of St Ignatius
- Walk with the excluded
- Care for our 'common home', God's Creation
- Journey with young people.

We do this through:

- **Parish ministry** – in parish communities and university chaplaincies
- **Education** – institutions at primary, secondary and tertiary levels
- **Formation** – of priests, religious and lay people
- **Social justice and the relief of poverty** – running the Jesuit Refugee Service, reaching out to the marginalised and to indigenous people
- **Care of elderly and infirm members**
- **Spirituality** – giving retreats and spiritual direction in spirituality centres, parishes, chaplaincies and online
- **Work overseas** – missioning men, funding projects, and running Jesuit Missions. □



11

parishes served



126

Jesuits



2

university chaplaincies



11

Jesuit schools



13

Jesuit communities



361

staff members

A Year at Saint Francis Xavier, Liverpool

“As an inner-city parish we blend the sacred and the profane.”

Fr Denis Blackledge SJ

OUR PARISH is over 170 years old. Our unique selling point is our warm welcome and hospitality. Many folk on entering our beautiful Grade-II* listed church remark on the ‘feel’ of a lived-in church. We keep the building open almost daily for as many hours as we can. Situated in the city centre, we get visitors who are on holiday and even passengers from the growing number of ocean liners that tie up on the River Mersey. We’ve been used as a filming location: most recently for the Jimmy McGovern six-hour BBC1 drama, *Broken*, starring Sean Bean as Father Michael Kerrigan, an urban parish priest working in northern England. That won Sean a BAFTA, and a role for me as Religious Adviser for the series.

The mainstay of the parish is our team of homely reliable helpers who, although getting on a bit in years, offer their loving voluntary service behind the scenes. Our beloved sacristan, Tony O’Driscoll, spends hours keeping the church looking clean and sparkling.

Our Monday Crew, who come in to clear up after weekends, are always on tap for any events that occur where we need a catering team, and offer invaluable time and energy.

Opposite our church main gate is the Whitechapel Centre, a charity which supports our city homeless, with donations for their meals, warm clothing for winter, and those little extras for Christmas – and even the occasional funeral service for when it is sadly needed.

Ecumenical teamwork comes in the shape of our Faith Primary School. In just two years, this joint venture between the Liverpool Anglican Diocese and the Roman Catholic Archdiocese of Liverpool has lifted the school from the doldrums to winning the 2019 Daily Echo prize for Best Primary School in the City. Faith is a close parish-school partnership between ourselves at SFX and St Peter’s Anglican church nearby

that has delivered an OFSTED rating of ‘Good, with Outstanding Qualities’ and ‘Outstanding Plus’ for its religious ethos from both Dioceses.

The Liverpool Philharmonic Orchestra has provided music teachers for Faith Primary School and other schools for over a decade using orchestral music making to improve the life chances of children. Once a year the children take over the Philharmonic Hall for a concert!

At present we are soaked in Synod 2020, responding to Pope Francis’ request that we become ‘a listening church’. Our SFX parish Pastoral Assistant, Debbie Reynolds, who has worked within the Archdiocese for thirty years, is privileged to be on the core Synod Working Team, at the request of Archbishop Malcolm. Five hundred delegates will meet for a final weekend in October 2020, two thirds of them laity from all across the Archdiocese. Our Christian Life Community group has been centring on the Synod themes.

Finally, we are on the Creative Campus of Hope University, which sees state-of-the-art technology and performance spaces sit alongside inspirational Grade-II listed buildings. Both staff and students make use of our church, either for the occasional religious service, via members of their chaplaincy team, or for student educational visits, or the occasional art exhibition.

As an inner-city parish we blend the sacred and the profane. Because we know that, for those with eyes to see, the sacred and the profane are one and the same reality. □



Fr Denis on the far right with his team of helpers

Jesuit Young Adult Ministries

“One thing that quickly became evident was that young adults in London are looking for ‘belonging.’”

Fr James Conway SJ

JESUIT YOUNG Adult Ministries began in September 2018, when two Jesuit priests and a Jesuit Associate moved into a former Jesuit student residence in Clapham in South London, right on the edge of Clapham Common, looking out on to the expanse of green grass.

The existing Sunday 7.00pm Young Adult Mass at Farm Street Church had developed over the last fifteen years, and we were asked to accompany these young adults as well as the six interns of the Bishops' Conference Faith in Politics Programme. The vision was to extend this by helping 20-35 year-olds reflect on and live the Catholic faith in light of the Pope's letter, *Laudato Si'*, *On Care for the Common Home* and through the Pope's exhortation on the Synod for the Youth, *Christus Vivit*.

Laudato Si' sets out a way to build and heal relationships with God, with

other people and with creation. As a result, our ministry begins with meeting young adults 'where they are at' in their lives: to build relationships with them in order to lead them to Christ and help them follow his call to life. In the manner of the first Jesuits, we begin by listening to and in conversation with those we meet so that we can help them discern the deeper harmonic of how God is calling them into friendship.

Since Pope Francis invites us to listen to God with an attentiveness to the cry of the poor, we took advantage of the empty rooms in our house to offer one of them to a guest from the Jesuit Refugee Service's *At Home* hosting scheme. This allows us to offer a hospitable welcome and safe space to an otherwise destitute person who has no recourse to public funds.

Since, at the beginning, the Jesuit team of three, were not experts on Integral Ecology, as described in *Laudato Si'*, we started monthly Saturday gatherings to explore the Pope's letter. We invited interested young adults to join us and, over the course of the year, we have seen the numbers attending these monthly 'Clapham First Saturdays' grow to about forty people, with more than one hundred young adults attending overall.

One thing that quickly became evident was that young adults in London are looking for 'belonging.' Some want to belong in a peripheral sort of way whilst others through a more intense experience of community and relationship. To this end, we took another vacant Jesuit house in Brixton to set up **MAGIS@Home**, a residential one-year programme for six young adults working in a variety of fields to share community and enter into a formation programme of Ignatian spirituality and reflection.

We have also started offering individual spiritual direction and opportunities for retreats and prayer. Advice from a German Jesuit who works with this age group also encouraged us to offer monthly weekend silent retreats in the Clapham house using the spare bedrooms. The success of all of these has confirmed our sense that young people are looking for spaces to be silent and still. Our 'Unplugged' retreats aim to do just that; to help them disconnect and engage with something deeper. □



Jesuits and Young Adults enjoying a 'Clapham First Saturday'

🖱️ **FIND OUT MORE**

Visit www.facebook.com/jesuityam/

London Jesuit Centre

“This new centre aims to provide high-quality, integrated formation in theology, spirituality and social and environmental justice.”

Dr Theodora Hawksley

AS WE move into the second decade of the twenty first century, the world is facing an unprecedented ecological, political and spiritual crisis. More than ever before, we need people of vision who can understand this crisis and respond to it in integrated ways. At the same time, the Catholic Church in the United Kingdom is rapidly losing its ability to reach and form new generations in the vision of the Gospel and Catholic tradition.

This challenge is the catalyst for one of the British Province’s new ventures, the London Jesuit Centre. This new centre aims to provide high-quality, integrated formation in theology, spirituality and social and environmental justice, with a particular focus on the needs and concerns of young adults. The aim is to form young adults and others as agents of change: as people who know and love Christ, who are well formed in their faith and engaged with the world’s most pressing challenges, and who are committed to walking with people on the margins. Our hope is to do this not for young adults, but with them: accompanying them, and engaging them as active collaborators in a shared mission. Here, close collaboration with the developing work of the Young Adult Ministries team is key.

Although the London Jesuit Centre is a new venture, we are not starting from scratch. The project builds on the work of the Mount Street Jesuit Centre, which has a fifteen-year history of providing welcome, accompaniment and formation opportunities in Central London. We are also (literally) building on their achievements, with a significant refurbishment of 114 Mount Street, which will provide new and upgraded

spaces for teaching, worship and social gatherings. In a different way, the London Jesuit Centre also builds on the legacy of Heythrop College, and carries forward the Society’s commitment to supporting Catholic theology in the UK. The new MA in Theology, Ecology and Ethics, hosted at the London Jesuit Centre, is a promising start in this area.

The vision for the London Jesuit Centre is the result of a long process of discernment, prayer, research and planning. Our experience so far has been one of remarkable synergy between what our research has told us about young adults’ desires for community, accompaniment and action

for justice, and the priorities identified in the Universal Apostolic Preferences. We have also been struck by the sheer number of possibilities for collaboration we have encountered, and the enthusiastic response from people who are keen to be part of this new initiative.

Like the building work, the process of discernment and planning is ongoing. There are still practical decisions to be made about the focus and scope of our work, and new people joining the London Jesuit Centre team will bring their own gifts and insights. Please continue to keep this new venture in your prayers over the coming year. ☐



Theodora Hawksley glimpsing a hope-filled future for young adults

Laudato Si' Research Institute

"We strive to be a catalyst for new knowledge that addresses the twin challenges of people and planet."

Dr Celia Deane-Drummond



Celia Deane-Drummond welcoming everyone to the first public lecture organised by the *Laudato Si'* Research Institute

for research. Rebecca worked previously as Assistant Director of The Center for Theology, Science, and Human Flourishing at the University of Notre Dame which promotes research projects of significance for the dialogue between the sciences and the humanities.

In December 2019, we appointed social scientist Dr Severine Dénéulin as the Director of the Integral Human Development research hub. With a DPhil from Oxford in International Development, Severine was a Kellogg Visiting Fellow at Notre Dame University where she conducted research on engaging development policy and practice with religious traditions. Her research expertise is in Latin America, and she has had extensive academic collaborations with universities in the region, including Argentina, Chile, El Salvador and Peru. She is also working with the University of Bath and teaches a postgraduate course on international development ethics at the University of Bethlehem in Palestine.

With multiple events and programming starting up, 2020 promises to be a busy and exciting year as we strengthen our operations, cement partnerships, and connect scholars through the newly formed *Laudato Si'* Research Network.

As the Institute's own response to 'the cry of the earth' and 'the cry of the poor', we strive to be a catalyst for new knowledge that addresses the twin challenges of people and planet, inspires a new generation of researchers, and makes a difference at the practical and policy level. □

🖱️ **FIND OUT MORE**

Visit www.campion.ox.ac.uk/?q=lsri

AUGUST 2019 saw the establishment of the *Laudato Si'* Research Institute at Campion Hall, University of Oxford. As its inaugural Director, I have the great privilege of guiding the new institute as it grows to fulfil its purpose of fostering research for societal transformation on our most pressing environmental issues.

The urgent demands of our common home laid out in *Laudato Si'* mean that the Institute could not afford to wait until we had everything structurally in place before beginning our work. Prior to opening our doors and hiring staff, we succeeded in gaining our first research grant, funded by the John Templeton Foundation, with collaborators at York University for a project on gratitude – one of the ecological virtues. We then were

successful in a competitive bid with Edinburgh University to fund a postdoc on research on ecological restoration. By the end of 2019 we had received another award to fund two of our research hubs. These early successes suggest that our compelling mission from the Jesuits in Britain coupled with the collective expertise of our staff is already putting the Institute on the map as a significant locus for research.

I am particularly grateful for the appointment of two outstanding team members – our Associate Director, Dr Rebecca Artinian-Kaiser, and Administrator, Adina Henson. Both have extensive knowledge of the research enterprise, and together we have made significant progress toward developing the infrastructure

Oxford University Catholic Chaplaincy

“The old and the new – it’s perhaps something that we bring to this work as Jesuits.”

Fr Matthew Power SJ

IN 2008 The Bishop’s Conference of England and Wales entrusted the running of the Oxford University Catholic Chaplaincy to the Jesuits. All previous senior Chaplains had been diocesan priests, though many had been assisted over the years by religious based in Oxford, including the Jesuits in Campion Hall.

Situated opposite the entrance to Christ Church meadow, on the busy thoroughfare of St Aldates and with views across to Christ Church itself, the Chaplaincy is a mix of the old and the new. Talks take place in the grandly named Old Palace, in the building that was the residence of the first Bishop of Oxford. It’s here too that the three resident Chaplains, two Jesuits and a lay Assistant, live and where on Sunday evenings the 13 resident students with the Chaplains gather for supper together. On three weekday mornings there’s a very happy hubbub as a dozen or so students get launched into the day sharing breakfast after an 8am Mass.

Adjoining the old is the New Wing that went up in the 70s. With Chapel, large meeting hall (used for the Sunday 11am Mass), library – generously refurbished by the Jesuits a few years ago – rooms for the resident students, their kitchen and beautiful terrace, the New Wing provides a wonderful home for the University’s Catholic students.

The old and the new – it’s perhaps something that we bring to this work as Jesuits, a desire to navigate a path that keeps those two poles both in play: to support the students as they seek to strengthen their sense of Catholic identity, often by providing



The annual Oxford Corpus Christi Procession arriving at the University Catholic Chaplaincy

space and time for exploration of the traditions of the Church through the talks organised by the Newman Society, and to offer encouragement to be open to the Spirit in the here and now.

So discernment is needed; so too a spirit of openness to make the service of the Catholic student body in Oxford as collaborative as possible. There is an unusually high level of Catholic presence in Oxford and many students find this a great enrichment. We are engaging with the Oratorians, the Benedictines at St Benet’s, the Dominicans at Blackfriars, Opus Dei, the Companions of the Order of Malta, and of course the Jesuits at Campion Hall, to look for ways of helping the students in their lives of faith. Also offering us significant support, and another important partner in our collaborative efforts, are the Anglican (and in one case, Lutheran) college Chaplains, who welcome us

to celebrate Mass in the colleges and engage very positively with the Catholic students in their colleges.

We know we are the custodians of something very precious that has been nurtured here in Oxford for over a century now. We are greatly indebted to the Newman Trust who manage the buildings and fund our activities, and to the student committee of the Newman Society, The Oxford University Catholic Society, who animate so well some key activities in the Chaplaincy. We trust that what one student recently said will be echoed by many others: ‘Being part of the Chaplaincy community has truly enriched my life. Not just because the Chaplaincy is where I attend Sunday Mass but because it is a place where I’ve found friends like nowhere else.’ □

 **FIND OUT MORE**

Visit www.catholic-chaplaincy.org.uk

Centre for Chaplaincy in Education

"A Chaplaincy in every school and college in the country in the next 10 years."

Maggie Everett



The Summit on School and College Chaplaincy looks at how to measure success in chaplaincy

on School and College Chaplaincy, its first such gathering of leaders from all Christian organisations and denominations (from the Roman Catholic Church, Methodist Church, Elim and the Church of England, the Free Churches Group to Woodard Schools Trust, Youth for Christ, TISCA, Chaplaincy Central, Festive and Scripture Union NI, to name but a few).

It was a day of engaging with issues such as how we measure success in chaplaincy; how we contribute to collaborative transformation in Chaplaincy in schools and colleges; what we most want to say to our churches; and what we hope to see develop in Chaplaincy in schools and colleges in 10 years' time.

One of the four Universal Apostolic Preferences recently announced for the Society of Jesus worldwide is to accompany young people in the creation of a 'hope-filled future', and so it is no surprise that the Jesuits in Britain are heavily involved in the work of the CCE. In fact the centre was born out of a joint vision of Fr Adrian Porter SJ, Director of the Jesuit Institute, and Rev Brendan Glover of Woodard Schools, both of whom are now trustees. The Jesuits bring a distinctive spiritual wisdom to this project and in fact funded the setting up of the new charity.

Why do we do all this? Because our young people need people like Patrick. □

CHAPLAINCY IS the most amazing, undersold and misunderstood ministry. People 'get' what a schools-worker might do (well that's taking assemblies and RE lessons isn't it?) but being a chaplain? Surely that's just for ordained clergy who wear a 'dog collar'?

How wrong can we be! The majority of school and college chaplains are not ordained; chaplains may have a variety of training routes and backgrounds BUT they are all people with a passion and vision for supporting young people where they are. Where young people are in school. Schools and colleges are crying out for support for young people. What better way can the Church help than by engaging with Chaplaincy?

Patrick works in a local Middle school as a chaplain. His first words to me were: 'The best thing about what I do? I get to spend time with young people who often have no one else to talk to'.

Patrick has spent three lunch times a week in that school for a year; has loitered around the playground; mopped up spilt drinks and food for the students who have physical challenges; sat with, cried with, laughed with and worked with those who are isolated as well as the most popular. Patrick has enthused pupils in assemblies ('he makes them fun') and worship, organised prayer activities, runs the 'Forest School' and 'checks up on everyone who is on their own'. Omnipresent? No. In fact, Patrick is part-time, although you would never have thought so given the impact he makes on their lives! No wonder one pupil said to me: 'Every school needs a Patrick'.

Co-funded by the Jesuits in Britain, the Centre for Chaplaincy in Education (CCE) has a vision: 'A Chaplaincy in every school and college in the country in the next 10 years.' As a first step in this direction the CCE hosted a Summit

➤ **FIND OUT MORE**

Visit centreforchaplaincyineducation.co.uk

A Postgraduate Degree on Our Common Home

“Tackling our varied human responses to the biggest challenge facing the world.”

Fr Eddy Bermingham SJ

THE NEW Master's programme in Theology, Ethics and Ecology will allow students to better engage with the millions of young people around the world who believe that *Laudato Si'* and integral ecology are essential aspects of what it means to be Christian in the 21st century.

The collaboration between a Higher Education and a faith institution has worked well – it has had its own challenges, but it has nonetheless been mutually enriching. Most importantly, academics and students alike have really engaged in the modules both inside and outside of the classroom.

The first cohort of ten students who began in September 2019 are now in their second term. The course provides them with the opportunity to explore diverse methodologies employed in the fields of biblical studies, eco-theology, theological ethics and philosophy as they engage with today's climate crisis. Tackling our varied human responses to the biggest challenge facing the

world, this degree will enable students to work with a theology-led but necessarily interdisciplinary approach.

Co-created with the University of Roehampton the MA degree fully immerses students in the subject. Taught by a team of scholars contributing to this debate out of their various areas of expertise, guest lecturers from specialist research institutes and other organisations bring with them a wealth of experience and the opportunity for students to make contacts and build networks.

Students relish the opportunity to bring their academic learning to bear on their practical activity in this field.

Niall Leahy SJ, a Jesuit Deacon from the Irish Province, says the course has helped him understand the bigger picture: “The broad perspectives afforded by ecology and other sciences, and the even broader and deeper perspective afforded by theology,

have opened my eyes. I feel I can now speak more intelligently and persuasively about our current spiritual, ecological, social, economic and moral predicament. My classmates have also inspired me to live in a more eco-friendly way.”

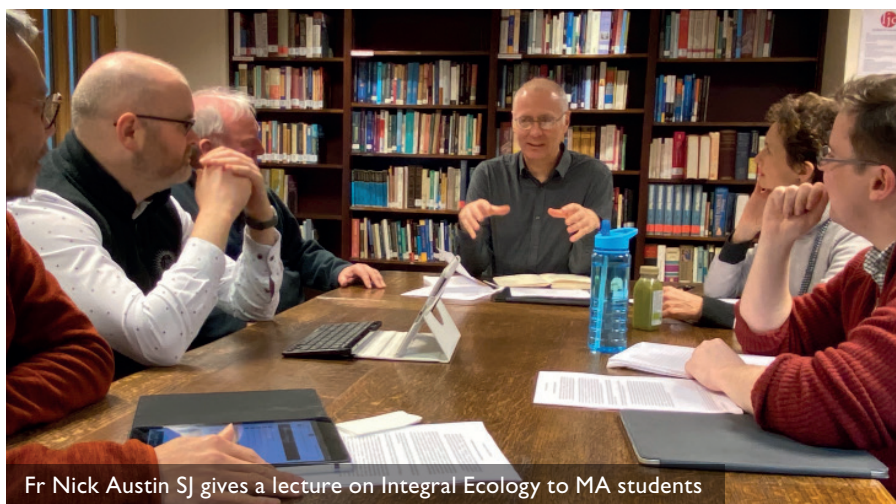
Melinda has enjoyed the chance to develop both a coherent faith-based framework and a new academic language with which to engage eco-activism. “The breadth of the course is one of its many recommendations. The lively debates in class are a particular highlight and the friendship and support of fellow students is to be treasured, especially for someone returning to studying after many years of working life.”

Rene wanted to reconnect with his childhood memories of living with nature: “The programme has provided me with a deeper understanding of the philosophical and theological background of ecology, but it has also introduced me to a wide array of people and movements involved in promoting ecological awareness to the public.”

Students have had placements with Christians for Climate Change and Extinction Rebellion; an eco-farm in Portugal; the Campus de Transition in Forges, France; the Barnes London Wetlands Trust; the Herts and Middlesex Wildlife Trust and finally the Columban Father's Youth Outreach Team. □

FIND OUT MORE

Visit www.roehampton.ac.uk/postgraduate-courses/theology-ecology-and-ethics/



Fr Nick Austin SJ gives a lecture on Integral Ecology to MA students

Living with a Double Vocation

“This is immensely motivating because you can see people getting better right there in front of you.”

Fr Paul O'Reilly SJ

Rated by the Care Quality Commission as ‘outstanding’, the Doctor Hickey Surgery in London’s Victoria aims to provide general practice medical support to the homeless population that is as good as everybody else expects. Newcastle-born Dr Mary Hickey, a nun, had returned from doing healthcare work in Zambia when she detected a new outlet for her energies and opened the practice in 1987. Since the Doctor Hickey Surgery opened, street homelessness has only got worse with the loss of hostels, difficulties of finding even temporary bedsit accommodation and the advent of crack cocaine.

The surgery’s other GP is Dr Paul O'Reilly – or Fr Paul O'Reilly SJ. For him, life has been a complex interplay of two vocations which fortunately for Paul and those he helps have come together in his life as a Jesuit.

One thing Jesuits have always done well is to take commonplace technology in one place and make it available to people who don't have it. We can even see this in Matteo Ricci's time in China: creating the first European-style world map in Chinese; predicting solar eclipses. Ricci brought technologies available in the West to enable people to take advantage of opportunities they wouldn't otherwise have had.

I knew I wanted to be a Jesuit when I was 18, but I also knew I wanted to go to university to test this decision. I studied medicine but I decided after two terms that my desire to become a priest had not gone away. I remember telling my parents over Easter that I wanted to become a Jesuit. This came as a huge shock to them – but it was only later that I realised why. When I had been a Jesuit for 8 years, I was told my father's big secret: he too had once been a Jesuit and I had never known it. My parents worried for many years that it was their fault I became a Jesuit. Fortunately my mother eventually accepted that it was my free decision.

The synchronicity kept cropping up: I went for my first candidates' weekend event which was a chance to prepare for entering the novitiate. I walked in the door and who should be there too but my best friend Rob Marsh whom I met every day for tea. I even typed his PhD for him – but he had never let on at all about wanting to join the Jesuits too. Rob is now a Jesuit based at Campion Hall.

SOME OF the poorest people in the world live between the palaces of Buckingham and Westminster. Street homelessness has risen year on year by 14%. But this is all fixable. Homelessness is basically a disease of fractured relationships, and Jesuits in many places are responding to this growing need by

continuing to offer homeless people a relationship. It is the freedom of our vows that allows us to make this sort of commitment: we don't have to put food on the table like our colleagues with families and we are able to absorb risks that they are not able to, both clinically and financially.



The Cardinal Hume Centre helps people to gain the skills they need to overcome poverty and homelessness – and is home to the GP surgery



Fr Paul O'Reilly in his surgery

That's when I first got involved with the Cardinal Hume Centre and Dr Hickey's Surgery which offers homeless people the standard of general practice that everybody else takes for granted. We are not specialists in any part of the body or any particular way of treating it, but we are specialists in a particular population of people.

You will never feel more useful than doing this work. The average life expectancy for homeless intravenous users is 34 years, but their average mortality per annum can be reduced from 9% down to just 1% if I can help take them off the street and get them to stop injecting. The maths means that I can save about 30 lives a year. I don't know another GP who can give you a figure of the number of lives they save – and this is immensely motivating because you can see people getting better right there in front of you. I dream of one day opening a major facility for homeless people in London. □

Meanwhile, I was growing increasingly disheartened and I saw becoming a Jesuit as a way to leave medicine behind. I completed my studies and did house jobs as a doctor until I was accepted by the Society of Jesus. I was very happy to be out of medicine because it really was not for me. When you work 72 hours continuously with zero sleep, you end up feeling you are doing more harm than good for your patients.

After that, I did perhaps the most important thing I have ever done: with all my worldly possessions I cycled quite slowly from Land's End to John O'Groats. The journey gave me my best ever experience of aloneness with God. I knew this trip was going to be the moment of decision, and sure enough it gave me the answer: 'Yes, I'm doing the right thing – I'm going in the right direction.'

However, no sooner had I entered the novitiate than the Provincial at the time told me that he wanted me to get back into medicine! I joined a Jesuit community in Manchester on a derelict estate and in the evenings worked part time in a hospital

kidney unit. I then went to Guyana for a year where I taught medicine.

I came back and started theology studies, but just didn't enjoy them.

FIND OUT MORE

Visit www.cardinalhumecentre.org.uk/need-help/surgery/



Practice Manager Tanya O'Brien outside the Dr Hickey Surgery with one of the patients

St Vincent de Paul Society at Farm Street

“The homeless people I have got to know absolutely inspire me with their gratitude and the fact that they do not give in to despair.”

Johannes-Robert Bruch

Farm Street Church sits amid one of the most expensive property areas in the world. As inequality rises, so the streets of Mayfair host growing numbers of homeless people. Every Monday evening for over 25 years, the volunteers of the Parish's St Vincent de Paul (SVP) Society prepare tea and soup, collect sandwiches donated from local businesses, and after a short prayer step out in groups into the night to go out and meet people. The volunteers come from a wide range of backgrounds: some are regular worshippers at the Parish Masses or the Weekly Young Adult Mass; others come with friends or colleagues.

One of the young volunteers is Johannes, a 27-year-old Engineering student at Imperial College who came to know the Jesuits through Fr Michael Holman SJ's involvement at Imperial's Chaplaincy Multi-Faith Centre. He first heard about the SVP Society from an appeal made at the end of Mass at Farm Street one Sunday by Yasko Kurahachi, who herself has been volunteering with the soup run for over ten years.

in diplomatic circles. It certainly shows in her ability to understand people and to stay calm. She deservedly won the Mayfair & St James's Community Award, and I am delighted to see that her work has been recognised in this way.

The homeless people I have got to know absolutely inspire me with their gratitude and the fact that they do not give in to despair. I cannot imagine how I would cope in their situation. I am deeply touched when they share their emotions and thoughts with me.

The soup run makes me so aware that we encounter Christ in everyone we meet: through people's gratitude for very small things and through the beauty of seeing people care for one another. ☐

SINCE I ARRIVED in London, I have been shocked by the sheer number of street-homeless people that I have encountered. I was attracted to this opportunity to help some of the poorest people in London on the doorsteps of the richest – it felt like a good use of my free Monday evenings.

For most of the people we meet, a friendly face and the little help we can bring are welcome. The material support we can bring people is very limited, but what is more important is the relationships we build with those we see. I have always felt an urge to be close to those who are excluded from society and for some of us these relationships are at the centre of our social lives.

On a typical Monday evening, I will leave my student hall just after dinner with some of the friends I have introduced to the group. We head to the London Jesuit Centre where we gather to pray

in the small Parish kitchen and then head out onto the streets at 7.45pm.

The project is run by Yasko Kurahachi. She is an inspiring woman: leading and motivating our team in a very welcoming and thoughtful way. I understand she was raised overseas from a young age and spent a long time

FIND OUT MORE

Visit www.farmstreet.org.uk/outreach



Yasko (seated) surrounded by SVP volunteers – including Johannes (centre in green coat and blue jumper)

Art and Faith at Farm Street

“Often new visitors will wonder who the sculpture is of, slowly realising it is Jesus when they see the wounds.”

Fr Dominic Robinson SJ



Homeless Jesus at Farm Street Church

THE CANADIAN sculptor Timothy Schmalz depicts Christ lying on a park bench in his work *Homeless Jesus*. Covered in a blanket, his face and hands obscured – the figure is only identifiable by the crucifixion wounds on his feet. Schmalz was inspired by a homeless man he saw in Toronto who bore a striking resemblance to Jesus and this provocative work of art challenges the viewer to identify Jesus with the most vulnerable in society.

Last year, Pope Francis unveiled Schmalz's epic work, *Angels Unawares*, that sits in St Peter's Square and depicts a boat of 140 migrants from different historic times and of various cultures. But it is *Homeless Jesus* that is Schmalz's most widespread piece, with more than 60 installed around the world, both outdoors and indoors, from Mexico City to New York, Rome to Buenos Aires.

Here at Farm Street, *Homeless Jesus* is installed inside the church where

regulars can spend time with it, even sitting down on the bench with Jesus. Often new visitors will wonder whom the sculpture is of, slowly realising it is Jesus when they see the wounds. Some people leave flowers on the bench, or grocery items that go to the Blessed Sacrament Church's food bank in King's Cross, or toiletries which go to the Jesuit Refugee Service Day Centre for asylum seekers in Wapping.

The rise in the number of people living on the streets is just one of the issues that you associate with that increasing gap between rich and poor. In addition to the SVP soup run, we also operate a weekly night shelter for four months of the year co-ordinated with other places of worship together with Westminster City Council. When it's our turn, we invite about 15 women and men for a meal provided by local hotels and restaurants such as the Dorchester, Claridges and the Connaught, as well as restaurants,

such as Scott's here in Mount Street which are all very keen to get involved. Our team of volunteers, many of them young people, serve the food, prepare the Arrupe Parish Hall for the guests, with some of the team staying overnight and serving up breakfast in the morning.

Farm Street's artistic connections go back to when it first opened in 1849. In the 20th century we were known as the Artists' Church; writers such as Evelyn Waugh and GK Chesterton were received into the Church here, while regular visitors included Graham Greene and Siegfried Sassoon – as well as Oscar-winning actor, Sir Alec Guinness.

Paintings also have a big impact at Farm Street, with artist-in-residence Andrew White bringing viewers into his paintings by using models from his own village to portray biblical figures in a contemporary way in his *Last Supper*, *Pietà*, or more recently *Mother Mary*, which shows the Virgin Mother as a 14-year-old girl.

Farm Street encourages young artists through Catholic Creators UK, providing them with exhibition space during the year. We host the Catholic Association of Performing Arts: young actors coming for retreats to help them grow deeper in their faith, and the Catholic Writers Guild of Great Britain brings together novelists and journalists for a monthly Mass, dinner and a talk. □

FIND OUT MORE

Visit in360degrees.co.uk/indie360/farmstchurch/

Hope for Southall

“Migrant workers become rough sleepers when any work they get in the early days collapses so that they cannot pay for their room.”

Fr Gerald Mitchell SJ

SINCE THE 1950s, Southall in West London has become home to large movements of people from the Punjab region in northern India, with labour migrants making up over 90% of the rough sleepers here. The Southall community's response to this most visible form of social injustice has been to set up an all-year shelter. Run by the charity *Hope for Southall Street Homeless*, the night shelter first opened in January 2016 and has operated every evening since. St Anselm's Parish Centre is one of two church halls providing shelter across the 7 days. Another church hosts a social and arts session one afternoon a week, led by the case work team.

Jagmeet and Gurpesh came from the Punjab to work but both ended up sleeping rough on the streets in Southall. Jagmeet took 8 months to

travel here, with 4 days spent without food in a lorry crossing the channel. He was eventually detained for three months after he broke out of the lorry when it stopped at a garage. 'I can't go back because the money is spent. In my mind I have to keep going.' With a wife and two children of three and two years, he wants to earn money for their education. But he arrived in the UK with a debt of £8,500. Gurpesh also arrived in the UK in a lorry and is £15,000 in debt. Yet the two men carry a burden of expectation to create some wealth for their families which Jagmeet says makes returning home without it barely an option. They are also totally excluded from any service except Primary Health.

Jagmeet and Gurpesh's human dilemma is heightened by the ethnic, religious and cultural identity they share with

around 50% of Southall's settled community, but they are alienated from joining in by their immigration status. Migrant workers become rough sleepers when any work they get in the early days collapses so that they cannot pay for their room. By the time an individual is found and assessed for a bed at the shelter, he is likely to be suffering from other physical symptoms, mental distress and, occasionally, from being attacked. Since arriving in Southall, both Gurpesh and Jagmeet have needed hospital treatment.

HSSH focuses its work on helping guests to recover their health, to deal with levels of addiction and, where possible, to work with independent immigration advisers. Our guests have only limited options beyond the shelter, but HSSH hopes at least to prevent a return to the streets.

The final resolution of this impossible situation is to return home. On average, two out of the sixty or more guests welcomed by HSSH each year reach that decision and the staff work to make their return as dignified as possible. HSSH is developing links with Caritas India to improve the process of readjustment.

HSSH can hope only to mitigate the effects of the dilemma each guest experiences from the failure to generate the income expected of him. There is no sign of a let-up in the flow of workers from this Indian state as it undergoes large economic changes to its agriculture that in the recent past made the Punjab the 'bread basket' of India. □



Fr Gerard Mitchell SJ with volunteer Vivian Jones at St Anselm's Parish Centre

FIND OUT MORE

Visit www.hssh.org.uk

The Hummingbird Project at Hurst Green

“A tiny hummingbird was busy fetching a few drops of water with its beak to throw on the flames: ‘I am going to do what I can.’”

Catherine Hanley

THE PUPILS of the Faith That Does Justice group at Stonyhurst College wanted to live out Pope Francis’ call for “every parish, every religious community, every monastery, every sanctuary of Europe” to take in one family affected by the global refugee crisis. They approached the headmaster and the governing body to petition the college to take in a Syrian refugee family. Headmaster John Browne was proud to give a resounding yes to the request: “It has been an encounter of real generosity from and with the wider community and has perhaps changed us more than the refugee family we now call our friends.”

Mr Alshahada explained that his family were forced to flee Syria when their house was completely destroyed: “Everything has gone. The beautiful memories we lived are all gone. Children in Syria spend all day in the streets without access to schools. Men are arrested for no reason. Syrian people are generous and hard-working, but they suffer from war – which means hunger, poverty and cold.”

The project took its name from the Legend of the Hummingbird. There was once a huge forest fire, and while all the animals were running around in circles, a tiny hummingbird was busy fetching a few drops of water with its beak to throw on the flames. The grouchy armadillo called the hummingbird a fool, but the hummingbird replied sagely: ‘I am going to do what I can.’

The college brought together a working group for the project, connecting staff members with the

preparatory school, St Mary’s Hall Stonyhurst, and the local primary school, St Joseph’s – together with parents from all three schools and parishioners from both the Catholic and Anglican parishes of Hurst Green.

They submitted an application to the Home Office to take part in its Community Sponsorship Scheme in partnership with the national Catholic charity, Caritas. The group had to show evidence that they could support a family to become self-sufficient within twelve months of arrival. This included securing accommodation for the family which was provided by Stonyhurst College; preparing for their arrival with the Department of Work and Pensions; exploring English language tuition and employment opportunities for the adult

members; and finding school places for the children.

The application was approved in early 2019 and the Alshahada family were welcomed to the Hurst Green community in June, making them the first school in the country to resettle a family as part of the Home Office scheme.

We hope what we have done will encourage other communities and schools to join the scheme. We have already received requests for advice and support from a number of schools across the country as well as other local parishes. It has been a remarkable journey for the family and everyone involved with the project, with all sides forming new and lasting friendships. □



Mrs Alshahada at home with volunteers from the Hummingbird Project

Legal and Creative Projects Bear Fruit at JRS UK

“Our refugee friends have already been let down by an asylum system that is too often hostile and steeped in disbelief.”

Sophie Cartwright

IN 2019, as part of our service to people made destitute by the asylum system, we set up a new legal advice service, which helps refugee friends to resolve their immigration status, access the protection they desperately need, and finally have a chance to rebuild their lives. We also developed a varied programme of refugee-led activities, which builds community and resilience, and gives refugees a chance to use and develop skills, old and new. These two projects have grown over the past year and are bearing fruit for our refugee friends and strengthening the whole JRS UK community.

The legal advice service fills a vital gap: cuts to legal aid have decimated quality legal advice. Being unable to spend the time they need on cases, good legal advisers find it harder and harder to provide the level of support they

want to in the face of growing need. Our refugee friends have already been let down by an asylum system that is too often hostile and steeped in mistrust. For many, things will have gone wrong earlier in their cases, and unpicking these difficulties takes more time than most solicitors are able to spend on it. This is one of several reasons why many who are legally entitled to remain in the UK struggle to prove this. The asylum and immigration system leaves thousands unable to progress their cases, and those we serve are among them. Our legal team, Michael and Jess, are able to help change this for some of our refugee friends.

Michael and Jess began work at JRS at the start of 2019. They bring a wealth of experience and commitment and have worked incredibly hard to set up

the legal advice service from scratch, getting to know refugee friends and grappling with their often complex legal cases. One of their first cases was for a refugee friend who has lived in the UK for over 20 years and has a family here. Thanks to his spirit and endurance and the legal team's hard work, he was finally granted leave to remain in spring 2019. He came into the day centre that week, overjoyed. He and his family were delighted to know that he was finally safe, and would not be torn from them. Since then, several others have been granted status with the help of our legal team.

Of course, other refugee friends continue to struggle through the asylum system. As they do so, they are caught up in the 'hostile environment': a matrix of policy and legislation designed to make their lives unbearable. They are barred from accessing services and from working, and also often from studying. Of course, these policies make it very hard for people to meet their basic needs. They also inhibit community engagement and participation, and so increase feelings of isolation and loneliness. This situation can go on for many years. People are not only prevented from developing new skills, but also explain to us that they feel they are losing the skills they once had. Ultimately, they are forced to the margins of society. The impact on people's sense of self and of how they engage with the world around them can be profound. In *For our welfare and not for our harm*, JRS UK's report authored by Dr Anna Rowlands, one refugee friend spoke of 'degrading in time'.



Michael and Jess of the new JRS legal advice service



Celebrating the work of the JRS Creative Arts Space



Hard at work in the JRS Community Kitchen

We wanted to counter this culture of marginalisation and to empower the people we serve – to acknowledge and facilitate their agency and participation. This is the thinking behind a programme of refugee-led activities including a community kitchen, drama group, and creative arts space. It builds on activities already underway to offer a range of opportunities for refugees to learn new skills and to lead. Creating spaces of learning and enabling not only offers immediate support to participants, it also builds leadership and other skills for the future, and so has an important long-term impact. As the project has progressed, we have seen community bonds develop, and got to know people who were not previously as involved with JRS.

We launched the JRS Creative Arts

Space and the JRS Community Kitchen in summer 2019.

Monday afternoons are an exciting time for JRS, because this is when the Community Kitchen takes place. Refugee friends take turns to lead the group in preparing food to a recipe of their choice – and at around 4 o'clock they start dishing out delicious food. This is an opportunity to learn skills in facilitation, as well as cooking, and it is always a time of joy. One of our friends who takes part said: "As a JRS service user, seeing how our food is made is very rewarding. Also, making collective decisions on the next menu is equally helpful. I also find the Community Kitchen very therapeutic as it is a chance time to be creative."

The Creative Arts Space is an art project designed, developed and delivered by

our refugee friends, which meets weekly at JRS. The group agrees on different themes and topics and explores these through a variety of media – such as painting, crafts and collage. This offers an opportunity for our friends to explore their own individual creativity and take ownership of the creative process. Some of the artwork produced was displayed at Mount Street after our Advent Service, allowing our friends to exhibit and explain their pieces to those who had come along for the evening.

As we look back over the growth of these projects, and more, over the last year, there is huge excitement for what lies ahead. □

 **FIND OUT MORE**

Visit www.jrsuk.net



JRS UK Drama Group with RISE Theatre portray the interminable journeys of refugees



Ahmed explaining the meaning of his painting at the Mount Street exhibition

2019: A Year of Empowerment at Jesuit Missions

“Caring for creation has become an important part of our work”

Clare Purthill

THIS YEAR we face a crossroads in caring for our common home, as world leaders prepare for the 26th United Nations Conference of Parties (COP 26) in Glasgow in November. At Jesuit Missions, we have been laying the groundwork to empower our supporters to speak out on the impact that climate change is having on vulnerable communities around the world and to promote alternatives – the small changes we can all make – to care for God’s creation.

We are proud of our work to help young people understand their role as global citizens in a worldwide community. Our Companions Programme was launched at Wimbledon College and St Aloysius College, Glasgow. Jesuit schools in the UK are partnering with Jesuit schools in the global south, with the aim of encouraging young people to be agents for social justice who speak up for the marginalised and lead action for change to create a more just world.

There are many ways to raise awareness of the challenges facing the world’s poorest. For example, a musical celebration of *Laudato Si’*. Students from Donhead Preparatory School, St John’s Beaumont and Wimbledon College performed in a concert to highlight the effects of climate change in a unique way with students from each school composing their own pieces using recycled materials. The students thought about what climate change meant to them and expressed their ideas through music.

We seek to equip our supporters to hold our leaders to account for

“The health, hope and harmony of our planet depend on wise stewardship and international action, which is where the Commonwealth is helping to show the way.”

their defence of the dignity of all people, especially the poor and marginalised. We were fortunate to welcome some excellent speakers this year to help us do just that.

Fr Xavier Jeyaraj, President of the Jesuit Social Justice and Ecology Secretariat in Rome, joined us for a speaker tour at the end of February.



Pupils from Wimbledon college participating in 'The Time is Now' climate change lobby in June 2019

He gave a series of talks entitled “Is leadership too important to be left to leaders?”. Fr Xavier encouraged his audiences to think about engaging in democracy as more than just elections, highlighting that democracy also needs a spirituality of justice and love.

A few months later, Baroness Patricia Scotland QC came to the Farm Street parish to speak about “Saving our common earth: No time to lose”. She told the audience about the influence that her faith has had during her role as the first female Secretary General of the Commonwealth. Lady Scotland said, “We are witnessing the impacts of climate related weather disasters.”

Thanks to our supporters, we were able to provide emergency support for South Sudan after heavy flooding in the Maban region, a place already vulnerable after years of conflict and chronic underdevelopment. Jesuit Missions are extremely grateful for the generosity of our supporters in responding to our appeal for people affected by the devastating Cyclone Idai which struck southern Africa in February 2019. We aim to provide long-term support with reconstruction and rehabilitation long after the emergency phase.

Our supporters are speaking out on the impact climate change is having on the world’s poorest. Jesuit Missions attended *The Time is Now* climate lobby in June, along with 12,000 others to lobby MPs to commit to net zero



Fr Xavier Jeyaraj giving a talk on leadership

carbon emissions by 2045. Before the lobby, supporters heard from Fr Damian Howard SJ, Provincial of the British Jesuits, and Mr Tim Farron MP, the Liberal Democrat spokesperson on environment, food and rural affairs. They spoke about the urgent need for action on climate change.

While talking to their MPs, Jesuit Missions’ supporters were able to use examples of how climate change is already affecting some of the most vulnerable communities in the world, including fishing communities in the Philippines and India.

In November, our Director, Paul Chitnis, participated in an international congress at the Jesuit Curia in Rome to celebrate

50 years of the Social Justice and Ecology Secretariat. The commemoration was an important acknowledgement of the service to faith through the promotion of justice.

Paul noted the congress’ importance in promoting a faith that does justice for our work: “For Jesuit Missions, caring for creation has become an important part of our work, from supporting Jesuit partners overseas who are involved defending their environment, to campaigning for better policies in the British government and participating in global networks.”

Our Christmas appeal for 2019 focused on the story of Patience, a young girl from Nigeria living in an area impacted by Boko Haram, where there are significant challenges to getting a basic education. Patience hopes to become a doctor and serve her community as an agent of change. We hope to give young women and girls like Patience an education to allow them to achieve their potential.

We are looking forward to another year of empowering our partners around the world to improve their communities, and equipping our supporters to put their faith into action and speak out for justice. □



Patience, aged 8, and her friends attend school in North East Nigeria, a region known for the presence of Boko Haram.

🖱️ **FIND OUT MORE**
Visit jesuitmissions.org.uk

Reference and Administrative Information

Trustees

The following trustees are in office as at 28 March 2020 and served throughout the financial year 2018-2019 (unless otherwise stated)

Nicholas Austin SJ
 Roger Dawson SJ
 Damian Howard SJ (Provincial and Chairman)
 Kensy Joseph SJ
 Keith McMillan SJ (Treasurer and Secretary from 14 April 2019, on appointment)
 Paul Nicholson SJ (Socius)
 Dermot O'Connor SJ
 Matthew Power SJ
 Stephen Power SJ (Treasurer and Secretary to 13 April 2019)
 David Smolira SJ

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Auditors

Haysmacintyre LLP
 10 Queen Street Place, London EC4R 1AG

Bankers

HSBC Bank plc
 60 Queen Victoria Street, London EC4N 4TR

Lloyds Bank plc
 39 Threadneedle Street, London EC2R 8AU

Main Investment Managers

AXA Framlington Investment Management
 155 Bishopsgate, London EC2M 3XJ

Cazenove Capital Management
 12 Moorgate, London EC2R 6DA

CCLA
 Senator House, 85 Queen Victoria Street, London EC4V 4ET

Cordea Savills
 33 Margaret Street, London W1G 0JD

Generation Investment Management LLP
 20 Air Street, London W1B 5AN

Estate Managers

Youngs RPS (incorporating Stanton Mortimer Limited)
 Priestpottle, Hexham, Northumberland NE46 1PS

Insurance Brokers

DE Ford
 Poppleton Grange, Low Poppleton Lane, York YO26 6GZ

Solicitors

Stone King LLP
 13 Queen Square, Bath BA1 2HJ

Working in Scotland

Registered Charity Number SC 040490

There was a Jesuit presence in Scotland earlier than in England. St Ignatius Loyola, founder of the Order, sent two of his companions, Paschal Broët and Alfonso Salmeron, to Scotland and then on to Ulster. They reached Edinburgh in December 1541 where King James V warmly welcomed them. They arrived in Scotland before the Reformation had even started and before John Knox was noticed.

Since then Jesuits have worked in many parts of the country. At present there are 15 priests and brothers present in Edinburgh, Glasgow and Inverurie.

The Sacred Heart Church in Edinburgh is a lively city-centre parish, offering both local and city-wide spiritual and practical care to hundreds of people. The adjoining Lauriston Hall and its cluster of meeting rooms provides a base for many activities and events including several AA and Al Anon groups.

The nearby St Catherine's Convent, run by the Sisters of Mercy, offers daily meals and practical support to over 200 people and is supported by many Sacred Heart parishioners.

The Lauriston Jesuit Centre is also based at the Sacred Heart, providing a rich variety of events and talks for the capital city and beyond. Attendance at these events can vary from a few dozen to over 200 depending on the topic or the speaker. In the last year such topics as the state of people in Palestine, a film on the life of Oscar Romero, a series of talks on ecology and spirituality, and three talks on religion and art have attracted appreciative audiences.

In Glasgow, St Aloysius Church is near the main shopping area and provides a daily service to a mixture of office workers, students and shoppers, a somewhat different group than those who attend mass on a Sunday. Its adjoining Ogilvie Centre is the base for many activities including a lively School of English for asylum seekers. It has been running for about three

years and attracts about 40 students each morning. The tutors are all volunteers and, considering it is run on a shoestring, it is highly regarded by the local authority.

St Aloysius College is a Jesuit school operating within an independent trust. It serves a large area of the west of Scotland and has developed a large bursary programme to help subsidise pupils whose families could not afford the fees.

The Ignatian Spirituality Centre is located close to St Aloysius Church and is noted for its courses, retreats and talks. In recent years, the Online Lent Retreat has grown from a small, local activity to providing thousands of people throughout the UK with a comprehensive programme of preparation for Easter.

Finally, in the north of Scotland, the lively parish of the Immaculate Conception in Inverurie, which is staffed by a single Jesuit who is attached to the Edinburgh community, serves a large, rural section of Aberdeenshire.



Our Short-term Targets

A reminder of what short-term targets we set ourselves in 2019 and a review of how we performed i.e. what progress has been made

Target set	Progress made
Governance	
Establish a British-Irish Joint Apostolic Planning Commission	The Joint Apostolic Planning Commission was set up in early 2019 to assess how Jesuit associated works in Ireland and the UK can collaborate together more effectively. Five areas have been recommended by the two co-ordinators for future collaboration. These are safeguarding, work with young adults, formation of lay partners, communications and integral ecology.
Safeguarding – carry out a review of how well Jesuit associated works are receiving and delivering on the safeguarding message	The co-ordinator and previous chair carried out a review of safeguarding policies and practice for most of our associated works and projects. This work is continuing and will be completed by the end of 2020 at the latest.
Complete a new tranche of safeguarding training for Jesuits in ministry	In the last quarter of 2019, the co-ordinator initiated a pilot training programme, which explores the area of spiritual abuse and what is meant by it. Core safeguarding training is being reviewed in the light of revised guidance from the Catholic Safeguarding Advisory Service.
Appoint a new Chair of the Safeguarding Commission	The new chair, James Reilly took over from Kevin Barry in January 2019.
Carry out a review of lay participation and involvement in Jesuit associated works with a view to devising new structures and communications strategies	A review was carried out during 2019, after which the Provincial decided to create an Advisory Council on Mission and the Apostolate to assist him in more effectively managing works with significant lay involvement.
Launch an apostolic discernment about our works in Scotland with a view to consolidating them and making them more coherent as a whole	The Jesuits in Scotland, led by Fr Dermot Preston SJ, undertook a process of consultation and discernment, the conclusion of which was that Jesuits in Britain should strive to maintain a presence in both Edinburgh and Glasgow, though taking steps to make that presence sustainable in the long term.
Start implementation of a new health and safety management system	A new health and safety management system was chosen and is being rolled out to all main locations.
Hold a Province gathering at Easter for Jesuits and lay partners in mission	A Province gathering took place the week after Easter 2019 at Stonyhurst College.
Adapt and promulgate a new internet policy document	An internal document titled 'Being Jesuit online' was published in Spring 2019.

Parish ministry

Secure further funding for essential work on Holy Name Church, Manchester (a nationally important Grade I listed church)

Major work on repairing the roof of the north transept was completed during the year. Meanwhile, an application to the National Lottery Heritage Fund was made to fund further work on the fabric of the building. Unfortunately it was not awarded.

Appoint pastoral associates in three more of our Parishes

Although funding was obtained for two of the posts the process of appointment is awaiting the conclusion of the Scottish consultation.

Appoint a programme director for the Lauriston Jesuit Centre in Edinburgh

This too was put on hold awaiting the conclusion of the Scottish consultation.

Education

Continue preparing for the launch of the *Laudato Si'* Research Institute at Campion Hall, University of Oxford

The *Laudato Si'* Research Institute began activities in September 2019, with Dr Celia Deane-Drummond as Director. Three research grants have already been obtained, and an official launch conference will take place in September 2020.

Gain approval for the start of the MA programme with Roehampton University

The MA programme in Theology, Ecology and Ethics started in September 2019.

Research and plan a new centre of integral formation for young adults in central London, including the appointment of a Centre Director

Adrian Porter SJ has been appointed as the London Jesuit Centre Director. The property at Mount Street is in the middle of extensive renovation work and the Centre should be ready to operate a full programme of events from September 2020.

Complete a strategic plan for Campion Hall to give direction to its work in education and research for the next 5 years

The Campion Hall 5-year Strategic Plan has been approved by the trustees, and is being implemented. Support from the Society's Fr. General has since been confirmed, a recognition of the international importance of the research and educational mission of the Hall.

Support the establishment of a National Centre for School Chaplaincy

The Centre for Chaplaincy in Education has been registered with the Charity Commission and held its first summit event in December 2019. The Society has supported this new initiative with significant funding.

Formation

Find appropriate uses for the newly vacated formation houses in London

During the year, one property was sold, while another is now being used for the Brixton MAGIS at Home Community, an exciting new programme for young Catholics, which offers an opportunity to share community, service and Ignatian spirituality, all in the midst of working life.

Provide major support for the worldwide formation of Jesuit priests from poorer countries

A number of scholarships to Jesuits from poorer provinces have been granted, some of whom study at Campion Hall, University of Oxford, and some of whom study elsewhere in the Province.

Finalise plans for the renovation of the novitiate (Manresa House) in Birmingham

Architects have been appointed and plans drawn-up, with planning permission now being sought. It is hoped that construction will begin on site in September 2020 with completion in January 2022.

Hold a gathering of the men in formation in August 2019	A successful meeting was held in the Barmouth villa house in August 2019 for Jesuits in formation from Britain, Ireland and the Low Countries.
Support the training of priests of the Syro-Malabar rite in Britain	During the year, a substantial grant was given to the UK Syro-Malabar Community to support the training of new priests.
Social justice and the relief of poverty	
Open a Legal Advice Project at the Jesuit Refugee Services (JRS) in January 2019 to provide diagnostic immigration advice, research and intensive casework support	The JRS UK Legal Project was successfully registered with the Office of the Immigration Services Commissioner and began work in January 2019, providing access to specialist legal advice and representation. Operating within JRS's Wapping centre, the project is able to spend the necessary time with refugees to accompany them through the complex system and to fully explain the options open to them to progress their cases, which typically are about fresh claims, statelessness and family/private life.
Begin a post-detention support service (from February 2019) in order to provide continuing accompaniment to people released from immigration detention	The service began a development phase in May 2019, providing facilitated peer-to-peer support meetings for people leaving detention.
Set up an accommodation project for destitute refugees, including planning approval, referral guidelines and internal policies, and recruitment of staff to open a 10-bedroom house from Summer 2019 onwards	This project has been delayed by the Local Authority planning process. A new start date has been agreed to open a house in Summer 2020.
Increase the number of refugees served at the JRS Day Centre, the variety of activities available and greater capacity to accompany refugees	Average monthly visitors to our weekly Day Centre increased to 266 in 2018/19 (231 in 2017/18). In addition, we now have planned a timetable of Refugee-led Day Centre Plus activities which take place throughout the week including new groups such as the Creative Arts Space and Community Kitchen.
Recruit and train more volunteers to visit people as part of our Detention Outreach Service	The number of volunteers who make visits as part of our detention team increased to 26 in 2018/19. As a result, we have increased the number of individuals receiving Casework Support to 148 (86 in 2017/18), while the number of individuals receiving Social Visits rose to 42 (18 in 2017/18). The detention outreach team are increasingly supporting victims of human trafficking in detention. Support was offered to 23 in 2018/19 (11 in 2017/18).
Increase networking and collaboration with others, increase the number of publications and events and develop self-advocacy by our refugee friends	Reports were issued on the experiences of survivors of human trafficking held in detention and on the experiences of the refugee community at JRS from a faith perspective. Advocacy through accompaniment has been promoted through collaboration with Campion Hall and a self-advocacy refugee group was launched in June. The number of outreach visits continue to increase and a number of open events were hosted at JRS.

Continue to work to serve the homeless through our Southall parish and hosting temporary night shelters in some of our properties in London and elsewhere

The Southall parish has continued its engagement with the homeless, along with migrants, the unemployed and those dealing with mental health issues and poverty. The Ealing Food Bank runs in the parish on a weekly basis. 15 parishioners took part in a 'Big Sleepout' in the parish grounds, raising funds for the parish-based Shelter, 'Hope for Southall Street Homeless'. Meanwhile, other Jesuit parishes continued to host temporary night shelters during the winter months in some of our properties. The sculpture Homeless Jesus was installed in our Farm Street Parish in 2019; this sculpture and the events surrounding its installation, have brought into focus the issue of the marginalised in London, especially the homeless and the poor.

Care of infirm and elderly Jesuits

Review and revise where necessary the policies and procedures we have in place

These are being reviewed on a rolling basis.

Spirituality

Replace the oil-fired boilers used at St Beuno's

The oil-fired boilers have been successfully replaced and housed in a new building. This has allowed the former boiler house to be incorporated into the main building.

Create an online Lent retreat in 2019

An online retreat was created with daily website material and additional resources and content for 2019. This was repeated in 2020.

Support the Wimbledon Park Mission Week in May 2019

The events were advertised and supported with handouts and general help.

Undertake a 31-day of St Ignatius campaign in July 2019 with a focus on Ignatian prayer

Daily website and social media content were made available for each day of the campaign.

Facilitate a series of regional gatherings for local Spiritual Directors

Five regional meetings took place in Preston, Manchester, Liverpool, Leeds and Birmingham, with 38 people attending.

Hold a seminar on common apostolic discernment at St Beuno's in March 2019

The 2nd St Beuno's Conference took place 21-24 March 2019. With the title 'Towards a Discerning Church', the conference sought to respond to Pope Francis' call for the Church to grow in its ability to discern. The conference was run jointly with Campion Hall, University of Oxford, and there were some significant academic keynote speakers and a selection of workshops and discussion groups. About 65 delegates attended, and the next St Beuno's Conference will be on the theme of *Laudato Si'* and ecological conversion.

Work overseas

Recruit and place up to 12 volunteers overseas, and increase opportunities for volunteers in the UK and actively engage with returned volunteers

JM placed nine volunteers with Jesuit partners overseas in the last year in South Africa, Kyrgyzstan, Tanzania and India.

Establish an Education Advisory Group and development of new Jesuit Missions' resources for schools with a focus on Actions 8-13 of the Rio Papers	The Education Advisory Group has provided valuable support and advice to Jesuit Missions about its work in schools. Resources were produced for the Cyclone Idai appeal, Lent 2019, the Climate Change Lobby of MPs and also for the Companions in Action Conference in September 2019.
Recruit a Parish Promoter to provide a Jesuit Missions, presence in the parishes	Five parish promoters have been appointed in parishes. Their role is to support Jesuit Missions locally by promoting their work and encouraging participation in events such as the London Marathon.
Increase parish awareness of the concept of 'A Faith that Does Justice', promote volunteering, and increase interest in the speakers' tour and in events such as the London Marathon	Speakers last year included Patricia Scotland, Secretary General of the Commonwealth; and Fr Xavier Jeyaraj SJ, Secretary of the Social Justice and Ecology Secretariat in the Jesuit Curia in Rome. 25 individuals ran in the London Marathon raising £47,000.
Create a Youth Leadership for Social Justice Forum (18–30-year-olds) entitled 'The Rutilio Grande Initiative' – to be rolled out over a three-year period	In view of the many other resources and initiatives which Jesuit Missions is pursuing, and limited staffing capacity, this was not taken forward during the year.

Short-term Targets for 2019–2020

What will we do?

A number of targets have been set for the forthcoming year.

Governance

Formation and Development of the Apostolic Body.

Communications

- Recruit a Communications and Media Manager and a Website and Digital Media Manager
- Set in motion the renewal of the Province website
- Develop a media strategy.

Development of the Province

- Recruit a new fundraising manager
- Discern the future of the Jesuit presence in Scotland
- Divest completely from companies that have extraction of fossil fuels as part of their primary business
- Rationalise our London housing provision for Jesuits.

Safeguarding

- Arrange for the publication of the Safeguarding Commission's minutes and annual report
- Agree with the Jesuit schools a Statement of Collaboration and establish the working arrangements and actions arising from this
- Procure and install a new records system
- Promote the 'Bridge to Support' outreach project to victim survivors of abuse in Scotland.

Parish ministry

The British Province's Pastoral Assistant gathers representatives to meet regularly to review pastoral activities in the parishes and chaplaincies we run. For the coming year:

- Take over responsibility for a third university chaplaincy.

Education

The work of Jesuit schools is supervised by the Jesuit Institute. The higher education sector has its own delegate. For the coming year:

- Continue the implementation of the Campion Hall Strategy by focusing on increasing postgraduate student intake, developing a communications strategy, renewing the website, reshaping the Library Collection, and pursuing research in areas such as Ignatian Spirituality, Refugees, and Integral Ecology
- Complete and evaluate the first year of the MA Theology, Ecology and Ethics course
- Explore the possibility of other MA programmes being run from the London Jesuit Centre
- Launch the *Laudato Si'* Research Institute at Campion Hall, Oxford.

Formation

The formation of young Jesuits is supervised by a Delegate of the Provincial. For the coming year:

- Launch a vocations campaign
- Obtain planning permission for the rebuilding of the novitiate at Manresa House, Birmingham and appoint contractors
- Set up a new Formation Commission tasked with renewal of the Province's Formation policy
- Launch a Summer Academy for Jesuits in Formation pilot project at Campion Hall, Oxford
- Host the European Jesuits in Formation [EJIF] summer meeting
- Appoint a Delegate for Continuing Formation
- Set up the Advisory Council on Mission and the Apostolate
- Roll out media support and training for key members of the apostolic body.

Social justice and the relief of poverty

Work for the poorest is carried out in parishes and also in our projects for the marginalised. For the coming year:

- Produce a resource on ecological conversion and transition
- Set up a project at Jesuit Missions to engage investment communities in pursuit of ethical and impact investment
- Explore uses for one of our properties in Wimbledon
- Support the 'Breaking Boundaries' project in partnership with the Centre for Catholic Studies, University of Durham
- Begin a project to support people leaving detention, including a peer support group and one-on-one emotional support and accompaniment and review the progress of the project in summer 2020
- Begin an additional drop-in session in Harmondsworth and review its impact on numbers served and our internal capacity
- Develop a new accommodation project for destitute asylum seekers in collaboration with the Holy Family of St Emily, with a view to opening the project in 2020-21
- Publish a new research and advocacy report on the experiences of people who have been detained
- Develop and roll out a new casework management system across all service areas including migration and cleaning of data in accordance with GDPR requirements.

Care of infirm and elderly Jesuits

The care of elderly Jesuits mainly takes place at our houses in Boscombe and Preston. The Provincial's Delegate for healthcare works with the Superiors of those two houses. For the coming year:

- Review succession planning requirements for our healthcare teams.

Spirituality

The Province's work in spirituality is carried out under the direction of a Delegate of the Provincial. For the coming year:

- Bring together key members of the apostolic body for a retreat in July 2020
- Continue to the next phase of the development of the St Beuno's building and grounds.

Work overseas

The office that co-ordinates this work is that of Jesuit Missions with its director. For the coming year:

- Establish and maintain a large programme around 'Care for Creation' with three projects from CSA Madagascar, JCED Malawi and St Peter's Zimbabwe
- Establish and maintain a programme around 'Social Justice' with two projects with Lok Manch, India and Casa Ricci, China
- Launch three new partnerships as part of the Companions in Action programme
- Produce Companions in Action online resources for primary schools
- Completion of all current parish appeals by June 2020 with a target of £13,000 to be raised for the year to August 2020
- Complete consultation ahead of the 26 UN Climate Change Conference of the Parties (COP 26) with schools and parishes.

Finance and Administration

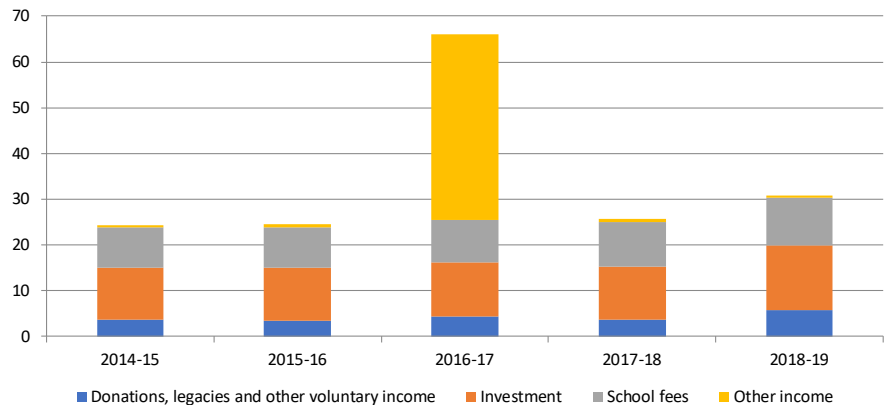
Financial Review

Income

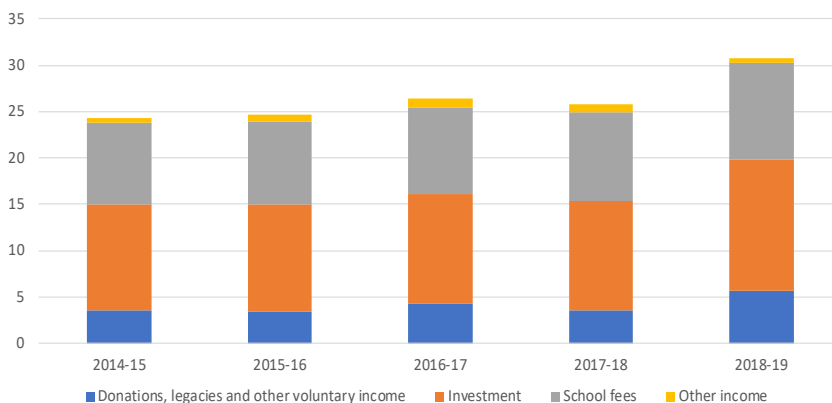
Income increased in 2018-2019 by over 19% from £25.8m to £30.8m i.e. up by £5.0m. This was mainly due to an increase in donations and legacies (up by £2.1m) and increased investment income (up £2.5m).

Looking at this over a 5-year period, we can see that in 2016-2017, income was exceptionally high. Income in that year was inflated by significant proceeds from a property sale in Kensington.

Total income – 5-year history (£m)



Total income (excluding one-off property sale) – 5-year history (£m)



Excluding this one-off item shows a relatively steady increase over the course of the last 5 years.

Expenditure

Raising funds

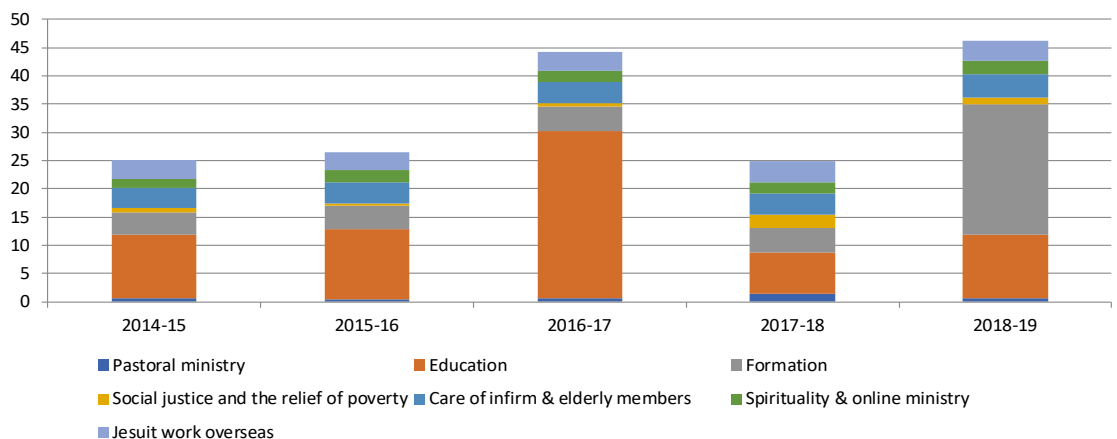
Expenditure on raising funds mainly consists of the costs charged by our investments and property managers and relate to the value of our investments rather than to income generated. These costs have remained stable compared with last year.

Charitable expenditure

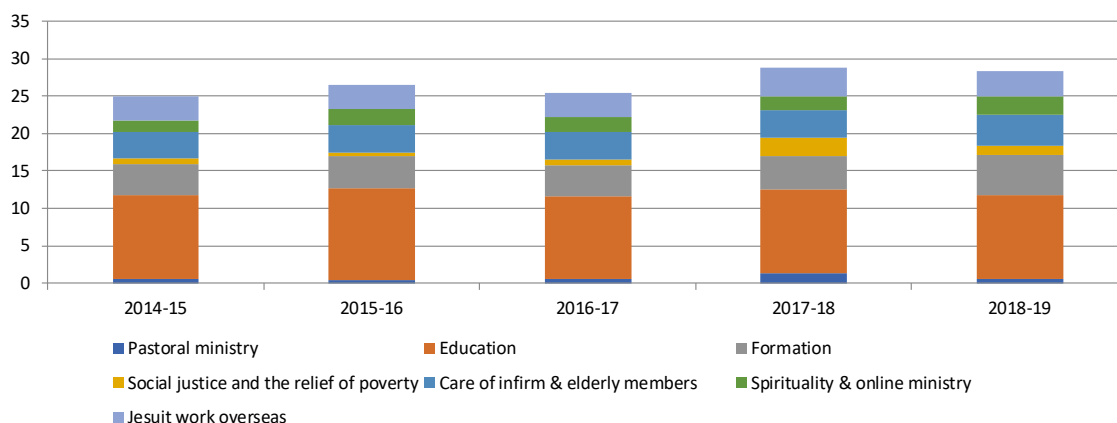
The Charity's expenditure on its charitable activities amounted to £46.1m (2017-2018 - £24.9m) as a result of a grant of 20 million euros (£17.7m) to the Jesuit Delegation in Rome for the support of the formation of priests at the Gesù College. Another large grant was given in 2016-2017 when £18.7m was given to Heythrop College to cover its teach-out and closure costs. However, this proved to be an overprovision, so in 2017-2018 there was a write-back of £3.9m which reduced costs in that year.

Adjusting for these 'exceptional' amounts reveals a much steadier increase in costs over the last 5 years.

Total charitable expenditure – 5-year history (£m)



Total charitable expenditure excluding one-off major grants (£m)



Net income / expenditure before gains on investments

The grant to the Jesuit Delegation in Rome for the Gesù College resulted in a large deficit (before investment gains) of £18.1m.

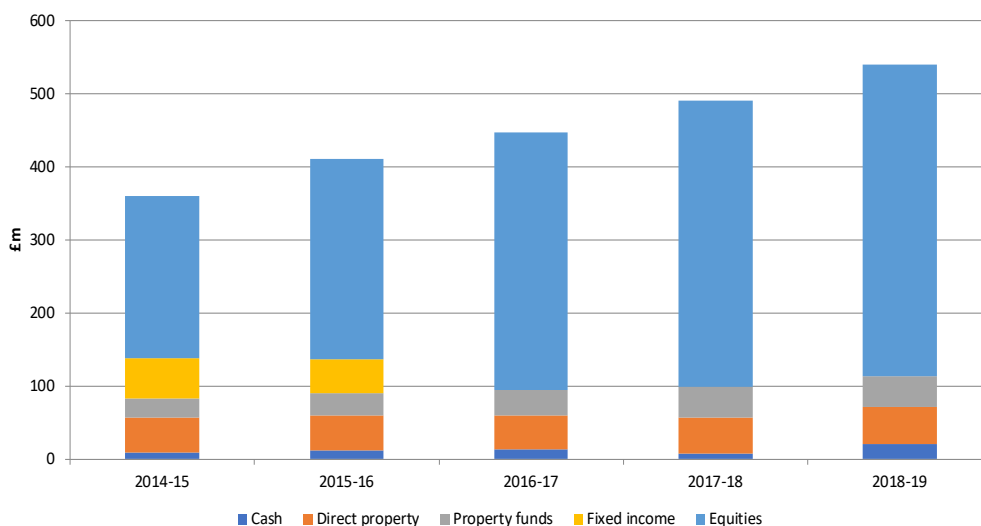
Investments

Further investment gains were recorded during the year, amounting to £26.0m, following on from gains of £47.6m in 2017–2018. These gains are mostly unrealised in nature and are subject to the volatility of equity markets. While investments have grown during the last few years, there is no guarantee that investments will continue to do so in the future and gains could easily be reversed. For this reason, emphasis has been placed on holding sufficient cash reserves, so that sell-offs are not required to fund our work at a time when markets are weak. The graph below shows the steady increase in the value of investments over the past 5 years.

Net movement in funds

The grant of £17.7m to the Jesuit Delegation in Rome for the Gesù College was more than offset by the investment gains of £26.0m during the course of the year. The nett result was a positive movement in funds of £7.9m. This followed another net positive movement in funds in 2017-2018 of £45.7m, almost entirely due to the investment gains in that year of £47.6m.

Total investments – 5-year history (£m)



The Funds of the Charity

The total funds of the Charity amount to £645.7m up from a year earlier of £637.7m.

Funds fall into three categories:

Restricted Funds: £144.9m of funds are for particular projects, subject to specific conditions imposed by the original donors. These are described in fuller detail in the notes to the accounts.

Designated Funds: £496.4m of funds are designated (or set aside) in order to enable the Society to further fulfil its mission i.e. the service of faith and the promotion of justice, as described more fully in this report. Although the Jesuit constitution provides that its funds may be built up to promote and endow its colleges and other works, permanent endowment is not allowed to its religious communities whose members have completed formation and are not in care. Jesuits covenant any income they receive to the Trust, so that all salaries, pensions, royalties, personal legacies, etc. are used for the works of the Trust, with the Trust meeting their living costs.

There are four main funds of the Jesuits in Britain, which have been designated to:

- Founding new institutes and work (Foundations Fund)
- Promoting and subsidising the Jesuits in Britain's works (Apostolic Works Fund)
- Paying the costs of study and training of Jesuits (Formation Fund)
- Providing for the sick and elderly Jesuits (Old Age Fund).

By designation of funds, the trustees retain the flexibility to respond to changing needs, while providing a useful method of balancing the different claims on funds.

More information on the designations is given in notes to the accounts.

Unrestricted Funds: in addition to the funds referred to above, general funds of £4.3m are available to support the work of the Jesuits in Britain in the future. These increased from £3.3m during the course of the year.

Fundraising

The Jesuits in Britain are registered with the Fundraising Regulator and aim to follow the Code of Fundraising Practice, which sets out the principles of general behaviour, asking for support, informing donors, treating people fairly and the processing of both personal data and donations. No complaints were received during the year. No external third-party fundraisers were used. During the year, a review recommended that fundraising efforts should be concentrated in certain apostolic works, with any support from the Curia provided as and when required.

The Jesuit Archives

The Jesuits in Britain Archives collect, preserve, and make available records concerning the British Province of the Society of Jesus. In 2018/19 the archives accommodated 80 visitors, responded to 164 enquiries, and contributed 24 blog posts to the Jesuits in Britain website on a range of topics, including the legacy of the First World War and the early history of the Province. Progress continues to be made with cataloguing the collection, and there are now over 12,000 catalogue entries available to search compared to 8,000 at the end of the previous year. The Archives also provided work experience and volunteering opportunities to 10 individuals considering a career in the archive profession. Particular highlights of 2018/19 include the conservation and digitisation of Manchester's Holy Name Church's architectural plans partly funded by the National Lottery Heritage Fund, and refurbishment of the archives reading room.

Reserves Policy

The level of reserves held is a matter for trustees, who review the reserves from time to time with a view to using surplus funds in accordance with the Trust deed, while also recognising the need to hold reserves in order to underwrite their day-to-day activities. Trustees also take into consideration a number of other factors, namely the reliability of its income, flexibility of costs in terms of whether they are fixed or variable, availability of cash, the requirements to invest in order to deliver its objectives and also the level of reserves in its various designated funds. The trustees' policy is to aim to hold between 6 months' worth of premises costs and 3 months' worth of administration and other support costs, which for the year ended 30 September 2019 equated to £3,376k (2017–2018: £3,520k). General funds at £4,300k improved again over the past year and are now well above target. The Charity considers this position to be acceptable, but will continue to monitor reserves closely.

Grant-making Policy

Funds are used principally to support work closely aligned with the work of the Society of Jesus, using its various restricted funds to support, for example, the work of the Guyana Region, along with Jesuit works in South Africa and Zimbabwe (both former regions of the British Province and where historical links remain). Trustees do not consider applications from the general public. A number of minor grants are however made to organisations and individuals whose work is aligned with that of the Jesuits in Britain through the Fund for Social Justice.

Investment Policy

The Trust's investment portfolio is overseen by an Investment Committee. Currently, the portfolio consists of listed investments, cash deposits and investment properties. The Trust continues to divest itself of directly owned properties in favour of holding property indirectly and this process continued with a further sale of an investment property during the year. The Investment Committee reviews the strategic allocation on a regular basis.

The equity portfolio is divided between three main managers. Within specified guidelines, the investment managers' objectives are to maximise total return, whilst providing a level of income advised by the trustees each year. The performance of each manager is reviewed on at least a quarterly basis and changes are made from time to time, if deemed beneficial. As at the year end, the total market value of our investments was £539.2m (2017–2018: £491.1m).

Ethical Investment Policy

Our policy provides a set of principles, looking forward to the type of world which we want to promote through our investments; intentionally investing in line with our fundamental ideals; supporting policies and initiatives in companies that promote the values of Catholic Social Thought, while still earning a just and sufficient return to help fund our works. Our policy is also informed by the UK Stewardship Code of the Financial Reporting Council, which promotes seven helpful principles for institutional investors. The trustees work to uphold the United Nations Principles for Responsible Investment within which institutional investors pledge to incorporate environmental, social and governance issues into investment decision-making processes, being active owners across all asset classes.

We do not invest in companies whose products or policies are counter to the values of Catholic moral teaching. Our investment managers screen our portfolios (using agencies such as EIRIS) to eliminate such stocks. The threshold limits for what we hold in certain stocks were reviewed and revised in 2018–2019.

The trustees are active members of the Church Investors Group, the Institutional Investors Group on Climate Change, the UK Sustainable Investment and Finance Association and the Charities Responsible Investment Network of ShareAction, all of which promote shareholder engagement.

During 2019, trustees decided to divest completely from companies

that have the extraction of fossil fuels as part of their primary business, a highly practical step to further the goals of the Paris agreement on the UN Climate Change Conference of the Parties also known as COP21 2015. Trustees also require investment managers to monitor the carbon footprint of their investment portfolios and their constituent companies with a view to identifying further areas for improvement and minimising our carbon footprint. Trustees recognise nevertheless that with a shift to a fossil fuel-free world there will be people who are losers in terms of jobs and livelihoods. For this to succeed, there must be funding and support for a just transition. Jesuits in Britain will need to be an advocate for this, particularly in its work in developing countries. Meanwhile, trustees continue to survey their own works and communities, especially their properties, with a view to minimising wasteful use of energy and promoting green energy.

In early 2020, the Jesuits in Britain was one of eleven institutional co-filers of the Barclay's AGM resolution asking the bank to finance fossil fuels companies only to the degree that they are aligned with the Paris climate change targets.

Basis for Accounts Preparation

The financial statements have been prepared based on the accounting policies set out after the financial statements and comply with the Charity's Trust deeds, applicable law and the requirements of the Statement of Recommended Practice (SORP FRS 102).

How we manage our affairs

The Board of Trustees

The Declaration of Trust dated 20 March 1929 provides that new trustees shall be appointed by resolution of the existing trustees. The trustees are incorporated under the Charities Act 2011 as 'Trustees for Roman Catholic Purposes Registered' (TRCPR).

As members of the Society, the trustees' living and personal expenses during the year are borne by the Trust. Trustees receive no remuneration for services as trustees.

The trustees met formally seven times during the year.

Trustees are chosen from members of the Society for their experience of the various works of the Trust, as described in this report. Given their considerable knowledge of these works, their induction focuses on the more technical responsibilities of trustees. This is achieved primarily by mentoring within the group, with sessions occasionally given over to discussion of a particular aspect of trustee responsibility, e.g. the Objects of the Trust. Use is made also of external seminars for ongoing training. The rotation of appointments is made so as to ensure a continuing body of experience within the group as a whole.

Organisational Structure

The overall responsibility for activities of the Jesuits in Britain (the British Province of the Society of Jesus) lies with the Provincial Superior, who is assisted by his Socius and by the Treasurer, and other central office staff. The Provincial, Fr Damian Howard SJ, meets with a group of Consultors monthly.

Each Jesuit community is guided by a local Superior who has responsibility for the activities of the Province in that locality.

Particular works (schools, retreat centres, etc.) may be the responsibility of a 'Director of Work' appointed by the Provincial or by a local governing body acting on the Provincial's behalf. It is normal for the Provincial to visit all Jesuit communities and works each year.

Constitution

The Jesuits in Britain are governed by the constitutions of the Society of Jesus and regulated by Canon law. The assets of the Jesuits in Britain are held in the following charitable trusts:

- Deed poll, dated 1 December 1921 of Society of Jesus Trust of 1921 for Roman Catholic Purposes (Charity Registration number 230166);
- Declaration of Trust, dated 20 March 1929 and subsidiary deed dated 3 April 1969 (Jesuit Development Fund) of Society of Jesus Trust of 1929 for Roman Catholic Purposes (Charity Registration number 230165);
- Trust deed dated 11 June 1990 establishing The Society of Jesus Charitable Trust (Charity Registration number 803659);
- Trust Deed dated 1998 establishing the Young Priests' Fund;
- Beaumont Educational Trust (Charity Registration number 309142); and
- von Hugel Charity (Charity Registration number 278966).

The Society of Jesus Trust of 1929 for Roman Catholic Purposes has been given charitable status by the Office of the Scottish Charity Regulator (OSCR) under Charity Number SC 040490.

The charities are treated as a single charity for accounting purposes (under Charity Registration number 230165), in accordance with uniting directions issued by the Charity Commission.

Beaumont Educational Trust (Charity Registration number 309142). This is a small fund generating bursaries to be applied in promoting the education of boys and young men in need of financial assistance in accordance with the doctrines of the Roman Catholic Church. Preference is given to those who can claim a connection with the former Beaumont College, Old Windsor. Its trustees are the same as those of the Trust and the two charities are treated as a single charity for accounting purposes.

The von Hugel Charity (Charity Registration number 278966) is connected with Corpus Christi Church in Boscombe. This charity is for the promotion, advancement or support of charitable work or works, at the absolute discretion of the charity's trustees, in the beneficial area (namely the Roman Catholic parishes of Boscombe and Iford).

Connected Charities

Mary Patricia O'Halloran Charity (Charity Registration number 509563)

This is a charity set up on the death of Mary Patricia O'Halloran, originally to benefit the poor of the Holy Name Parish in Manchester. The objectives have since been widened to serve the poor of the city of Manchester. Until recently, the charity had only a single Trustee. Charity Commission approval was sought and obtained for the Trustees for Roman Catholic Purposes Registered to become a Corporate Trustee for this charity, on the basis that the Society owns and uses Holy Name Church. Approval was given on the understanding that the funds would be kept separate and the charity has not been consolidated into these accounts.

Heythrop College (Charity Registration number 312923)

Heythrop College operated as the specialist Philosophy and Theology College of the University of London from 1970 until its closure at the end of January 2019. During 2019, the Society of Jesus, which originally founded the College before setting it up as an individual charity in 1970, took back control of the charity through appointment of its trustees. A change to the Royal Charter was granted by the Privy Council in February 2020. This will allow the charity to operate again in some limited form. The charity has not been consolidated into these accounts.

Committee Structure

Five main committees are appointed by the trustees to assist in their work.

Investment Committee

The principal role of the Investment Committee is to give advice on the management of and review the performance of the investment portfolios, while upholding the ethical restrictions on our investments.

The Investment Committee meets on a regular basis as need dictates, but at least five times a year. At each of the scheduled quarterly meetings, one of its Investment Managers appears before it in order to make a presentation reviewing the performance of each portfolio over the previous 12 months, to discuss economic prospects for the forthcoming year and to answer questions. The fifth meeting is dedicated to a review of its ethical investment policy.

Its current members are:

Mrs Marta Albert
Mr Richard Brumby
Mr Timothy Edwards
Mr James Holt
Fr Keith McMillan SJ (Chair)
Fr Christopher Pedley SJ
Br Stephen Power SJ (Trustee)
Mr Richard Saunders
Mr Stephen Withnell

Additional members, who join for the review of its ethical policy are:

Fr Nick Austin SJ
Mr Paul Chitnis
Dr Celia Deane-Drummond
Fr Frank Turner SJ

Finance Committee

The principal role of the Finance Committee is to consider operational financial matters, including accounting, banking, insurance, property, HR and other resourcing issues.

Its current members are:

Mr Timothy Edwards
Fr Damian Howard SJ (Chair)
Mrs Joan Lim
Fr Keith McMillan SJ
Fr Paul Nicholson SJ
Fr Christopher Pedley SJ
Br Geoff te Braake SJ

Safeguarding Commission

As required by the Bishops' Conference and the Conference of Religious, the Province has a long-established Independent Safeguarding Commission with an advisory and oversight remit. The Commission meets five to six times a year to discuss policy, practice and to advise the Provincial and trustees on these matters. It supports the province co-ordinator, where required, on specific casework matters.

In February 2019, James Reilly was appointed to the Commission and was immediately appointed as its Chair to replace Kevin Barry, who had served on the Commission for a five-year period. Its current composition is made up of seven lay members and two Jesuits. Their names and backgrounds are as follows:

Mr James Reilly (Chair)
(from February 2019)
Background: Social services and health

Fr Brendan Callaghan SJ
Background: Ministry and clinical psychology

Mr Jim Gallagher
Background: Policy and civil service

Mrs Emanuela Federspil-Bernstorff
Background: Public relations and Canon law

Prof. Wilson Muleya
Background: Social work

Mr Clive Myers
Background: Police safeguarding

Fr Peter Randall SJ
Background: Ministry and family therapy

Mr Stuart Sleeman
Background: Judge (retired)

Mr Richard Powley
(from November 2018)
Background: Social work and adult safeguarding

The Province safeguarding co-ordinator is Mrs Jo Norman, while Fr Christopher Pedley SJ continues to be responsible for the administration of checks and disclosures under the

Disclosure and Barring Service (DBS – England & Wales) and Protecting Vulnerable Groups Scheme (PVG – Scotland).

Safeguarding within the Province covers both children and young people under the age of eighteen and adults considered as being at risk of abuse. The Province, in keeping with the 'One Church' principle of having a single common approach, aligns its work with the principles and practices agreed by the Bishops' Conference (England & Wales and Scotland) and the Conference of Religious. This was reinforced formally in 2016 when the Province adopted its own over-arching safeguarding policy confirming this approach.

The co-ordinator has delivered eleven of the single day safeguarding training modules developed in 2016/17 (informed by CSAS training resources) to 85 people.

The Commission has recently reactivated a sub-group to revise and update the Province policy in relation to Adult Safeguarding and to advise on appropriate training to cover this aspect of safeguarding work. The outcome of this work will be incorporated into the Policy and Training in 2020.

In May 2019 Christine Edgar of CSAS undertook a review of the Provinces' safeguarding actions including its record keeping. She found current records to meet requirements but reinforced their previous recommendation to progress with an electronic records system. In the latter half of 2019, a working group was set up to procure an electronic record system. The outcome of the procurement was the purchase and installation of the CPOMS system as a bespoke safeguarding records system. Trustees have recognised that additional administrative capacity is required to initially migrate and then maintain records and support the co-ordinator in her administrative responsibilities. A temporary administrative assistant is in post pending a permanent appointment.

During the year, the Province was required to provide examples of its records to the national Independent Inquiry into Child Sexual Abuse (IICSA).

In November 2019 at its last public hearings into Safeguarding Practices across the Catholic Church, the record keeping practices of our co-ordinator were identified as an example of best practice by the independent reviewer, who commended her practice to other safeguarding staff in the Church.

In the course of 2019 work progressed on an outreach project in Scotland to victim-survivors of abuse whose experience means they are reluctant to approach Church related organisations to access support. This culminated in the Province agreeing a contract with Health in Mind, a well-established and independent provider of counselling and support to abuse victims in Scotland. In November 2019 Health in Mind recruited an Outreach Project Manager. The Steering Group, comprising of three staff from Health in Mind, Fr Dermot Preston SJ, Superior of the Jesuit Communities in Edinburgh and Glasgow, the Province co-ordinator and two members of the Commission, met and agreed its terms of reference for the implementation of this project. It agreed that it would be called 'Bridge to Support'. Early in 2020 active promotion of the project will begin adopting methods sensitive and tailored to the particular experiences of this group of victim-survivors.

Health and Safety Committee

An internal committee, consisting of Jesuits and staff members has been formed to provide a forum for consultation and discussion of fire and health and safety matters within the Charity. One of the aims of the committee is to promote a culture of awareness of Health and Safety and of continuing improvement.

Its current members are:

Mr Bill Blackledge
Mr Timothy Edwards
Fr Keith McMillan SJ (Chair)
Ms Brenda Micallef
Br Mick O'Connor SJ
Ms Sue Rumble
Mr Alec Thorp
Br Ken Vance SJ

The meetings are also attended by representatives of PIB Risk Management.

Risk Advisory Committee

During the year, a new Risk Advisory Committee was formed, meeting for the first time in November 2019. The principal roles of the Committee are to keep the trustees, who retain overall responsibility for risk management, informed of their understanding of the major risks facing the Charity and the adequacy of their response to those risks. As part of this they will make various recommendations concerning the risk register.

Its current members are:

Mr Anthony Carey
Mr Timothy Edwards
Mr Julian Gizzi
Fr Kensy Joseph SJ
Fr Keith McMillan SJ (Chair)
Br Stephen Power SJ
Mr Craig Walton

Risk Management

The trustees face numerous risks, both on a day-to-day basis and over the longer term. These risks relate to an uncertain event or set of events which, should it or they occur, would have an effect on the achievement of the charity's objectives. Risk not only refers to threats (i.e. damaging events which could lead to failure to achieve objectives and potentially have negative impacts), but to opportunities (i.e. challenges, which, if exploited, could offer an improved way of achieving the desired objectives). Risk exists as a consequence of uncertainty and is present in all activities whatever the size or complexity of the organisation and whichever sector it operates in.

Trustees consider risk management to be fundamental to good management practice and a significant aspect of corporate governance. Effective management of risk will provide an essential contribution towards the achievement of the charity's strategic and operational objectives and goals. As such, the trustees have adopted a risk policy which requires among other things the trustees to review at least annually the principal risks and uncertainties it considers the charity to be exposed to. The identified risks are grouped into a number of categories

including governance or management, operational, financial, environmental and external factors or legal and regulatory compliance. Each risk is assessed as to its impact and probability of occurring and given a score, which when combined is compared against a traffic light system with efforts being concentrated on any which show up as 'red'. The review of risks includes ensuring that procedures are in place and are being followed, putting in place a consistent basis of measurement, controlling, monitoring and reporting risk, ensuring the effectiveness of the procedures and considering an adequate response (including action to be taken to tackle the identified risks). The aim is not to eliminate risk altogether, but rather to ensure that every effort is made to manage risk appropriately.

This piece of work has identified a number of key risks and uncertainties as follows, along with ways in which they are mitigated. The top six risks are considered to be:

- **Coronavirus (Covid-19)**
The accounts are approved during a period where there is much uncertainty as a result of the emergence and international spread of a coronavirus (Covid-19). Arrangements have been put in place for as many staff members as possible to work from home and for our schools to deliver education online where possible. Wherever possible staff are being retained, but this may need to be reviewed if the lock-down continues for any significant period of time, especially as income will inevitably reduce. Investments too have fallen, but TRCP had kept a relatively high proportion of its investments in cash, so this should minimise the impact, especially as the Trust views itself as a long-term investor. During the next year or so there are significant expenditures planned for various works in the Trust. The cash flow is deemed more than sufficient. Nevertheless some of these projects could be deferred if this emergency situation goes on for a very significant time

- Falling numbers of Jesuits coming through formation, combined with the ageing of existing Jesuits. The main associated risk is that certain works may have to be discontinued going forward. A Vocations Promoter, together with young adult spirituality events, help young adults discern whether they might have a religious vocation, including one within the Society of Jesus. In September 2018, the *Laudato Si'* Community was established in Clapham. It is dedicated to welcoming young adults and helping them to engage in caring for our common home, following the teaching of Pope Francis' 2015 encyclical, *Laudato Si'*
- Effective governance of the Charity, which combines a Religious Order (with falling numbers) with various charitable aims, increasingly carried out by lay staff members. Trustees are looking at the possibility of changing its governance structure through use of a CIO (Charitable Incorporated Organisation), which would allow the appointment of lay trustees. In the Autumn of 2019, the Provincial created an Advisory Council on Mission and the Apostolate to assist him in more effectively managing works with significant lay involvement
- Dependency on investment income. The focus of fundraising is in the process of being shifted from the Central Curia Office to individual Jesuit works
- Safeguarding issues including the care of all staff members. While the Safeguarding Commission aims to independently hold trustees to account in respect of children (those under age 18) and adults considered as being at risk of abuse, there is no independent body to consider the care of its own staff. The charity, however, is a Living Wage Foundation employer, pays a contribution of 5% of a person's salary into a pension scheme (compared to a minimum of 3%) and offers a lump-sum payment in the case of the death of a member of staff

- Ongoing property commitments especially in respect of its churches and the Jesuit voluntary-aided schools, which put a strain on limited resources, while Government policy seems geared towards the establishment of Academies. The trustees have started to look at longer-term funding issues in order to try and plan more effectively for the future.

Equal Opportunities

The charity is committed to maintaining an equal opportunities and dignity at work policy for recruitment and employment. It respects the provisions against discrimination laid down by law and in the Catechism of the Catholic Church. No person will be discriminated against on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race (including colour, nationality and ethnic or national origins), religion or belief, sex and/or sexual orientation, allowing for what is justified by law or by the practices, rites, doctrines or ethos of the Roman Catholic Church.

In particular, the Society avoids unlawful discrimination in all aspects of employment including recruitment and selection, promotion, transfer, opportunities for training, pay and benefits, other terms of employment, discipline, and selection for redundancy and dismissal.

Gender Pay

As a large charity, the Jesuits in Britain is required to publish information each year (based on April data), comparing what it pays to its male employees and its female employees. Last April, there were 362 employees, of which 106 were male (29%) and 256 were female (71%). The findings were that the average pay for men was £17.24 per hour compared to the average pay for women which was £17.51 per hour, a differential of 1.6% in favour of women. This is a turnaround from that reported in the previous two years, when it was reported that the average female salary was below the average male salary. However, as noted previously, the data

is not on a job like for like basis and given how skewed the data is (there being so many more women than men), the data remains of questionable benefit. The other main finding was that the middle-placed (median) man is paid £14.29 per hour some 6.9% less than the middle-placed woman, who was paid £15.27. Charities are also required to report proportions of men and women in each pay quartile. This showed that there are proportionately more women in the upper and lower middle quartiles, while there are fewer women in the upper and lower quartiles.

The Jesuits in Britain will keep these numbers under review (repeating the exercise every year) and if ever action is considered necessary, it will undertake it.

Other Pay

The charity is an accredited Living Wage Foundation employer. The Living Wage campaign is based on a simple idea i.e. that a hard day's work deserves a fair day's pay. We are pleased to be one of many responsible employers who choose to pay a real Living Wage based on the cost of living, not just the so-called government National Living Wage minimum, which is set at a lower amount (£2.54 per hour lower in London). The current London Living Wage Foundation rate is £10.75 per hour compared to the Government minimum of £8.21. The trustees recognise that in low paid sectors a vicious cycle of high levels of staff turnover and absenteeism can drive problems of operational inefficiency, low standards and weak productivity. Organisations that pay the Living Wage have reported significant improvements in quality of work, reductions in staff absence and turnover, improved relationships between managers and their staff, and a stronger corporate reputation.

We have also looked at the ratio between the highest paid employee and employees paid the UK Living Wage Foundation rate and found it to be about 6:1. According to the Equality Trust, Chief Executives in the UK's top 100 companies are paid 150 times that

of their average worker (and therefore well over 300 times that of their lowest paid employee, earning the National Living Wage). The ratio for other large Charities (with income over £50m) has been reported as being of the order of 10:1.

Key personnel and senior staff

The charity offers fair pay to attract and keep appropriately qualified and experienced staff with the necessary skills required to lead, manage, support and deliver the charity's aims. There is no overarching Senior Management Team as such, but key personnel are appointed as Directors of Work for a number of our Works, including the Heads of the two Preparatory schools, Donhead and St John's Beaumont, our Spirituality Centres, Jesuit Missions and the Jesuit Refugee Service, along with the Director of Finance. The total remuneration, including all employer-related costs of the ten individuals involved, including Jesuits was £651k for the year ended 30 September 2019 [2018 - £588k]. The increase followed the appointment of Dr Celia Deane-Drummond as Director of the *Laudato Si'* Research Institute, a major new Work of the Province. Without this new appointment the increase would have been limited to 3%.

Public Benefit

Public benefit is achieved in a variety of ways, as can be seen in the detail provided above. This includes, but is not limited to, the following:

- service of parishes
- operation of schools and colleges of higher education; and provision of bursaries in the independent schools

- provision of university chaplaincy services
- social justice and the relief of poverty, working with the marginalised including the operation of the British branch of the Jesuit Refugee Service
- operation of spirituality centres, programmes and publications for spiritual education and other publishing and media (including free online resources); and
- the work of Jesuits overseas.

We have developed our plans to ensure that we continue to deliver public benefit and achieve our objectives set out in the Deeds and Declarations of Trust (listed above in Organisational Structure – Constitution). The trustees confirm that they have complied with the duty of the Charities Act 2011 and the Charities Act Scotland 2005 to have due regard to the Charity Commission's and OSCR's general guidance on public benefit.

Volunteers

The work of the Jesuits in Britain would not be possible without the contribution of volunteers. Several of our works have management boards or editorial boards comprising expert lay people, who give their time to advise and support our Jesuit and lay staff at regular meetings throughout the year. Our Investment Committee, Safeguarding Commission and Risk Committee have all recruited expert members who also generously give their time to support our mission.

The role of volunteers is especially important in two of our main works, namely the Jesuit Refugee Service and Jesuit Missions. Their contribution is

highlighted elsewhere in this report. Other Jesuit works, too, benefit from volunteer time, including, for example, our Archives Department, which benefitted from a total of 436 hours during the year.

Our parishes all rely heavily on volunteers to assist in many ways, from serving and reading at Mass to fundraising, finance and committees. Larger parishes have around 200 volunteers, smaller ones around 25.

The work carried out across the Charity also includes the efforts of the 100 plus Jesuits, although some are no longer in active ministry. Nevertheless, they continue to pray for the work of the Society. The Jesuits themselves take a vow of poverty so they personally take no salaries, royalties, fees or any other remuneration. Jesuits work as parish priests, chaplains, teachers, academics, writers, doctors, spiritual directors and artists. Any remuneration received is gift-aided to the Society to further the work it does. Members receive in return only enough to live on and are looked after when they become sick, elderly or infirm. The value of work done on behalf of the Society is considerable and might be conservatively estimated at about £6m. The value of the work of others (i.e. non-Jesuit volunteers) is also significant with many working in the service of their parishes, the work of the Jesuit Refugee Service, as members of Management Boards and various committees, etc. A conservative estimate of this would be £0.5m to make a total of £6.5m. If included in the accounts, this would add approximately 20% to the total income for the charity, which in 2018–2019 was £30.8m.

Statement of the Trustees' Responsibilities

The trustees are responsible for preparing the trustees' report and the financial statements in accordance with applicable law and the United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England, Wales and Scotland 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 Trust and of the incoming resources and application of resources 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 judgements and 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 Trust will continue in operation.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy the financial position of the Trust and enable them to ensure that the financial

statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008, the Charities Act of Scotland 2005 and the provisions of the Trust deeds. They are also responsible for safeguarding the assets of the Trust and 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.

Signed for and on behalf of Trustees for Roman Catholic Purposes Registered



D Howard SJ
Provincial

Approved on 28 March 2020

Independent auditors' report to the Trustees of The Society of Jesus Trust of 1929 for Roman Catholic Purposes (*incorporating The Society of Jesus Trust of 1921 and The Society of Jesus Charitable Trust*) (together 'the Trust')

Opinion

We have audited the financial statements of the Trust for the year ended 30 September 2019 which comprise the Statement of Financial Activities, the Balance Sheet, the Cash Flow Statement and related notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, Financial Reporting Standard 102, the Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the Trust's affairs as at 30 September 2019 and of the Trust's net movement in funds for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Charities Act 2011 and the Charities and Trustee Investment (Scotland) Act 2005 and regulation 8 of the Charities Accounts (Scotland) Regulations 2006.

Basis for opinion

We have been appointed as auditor under section 144 of the Charities Act 2011 and section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and report in accordance with the Act and relevant regulations made or having effect thereunder. We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the Trust in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Responsibilities of trustees for the financial statements

As explained more fully in the trustees' responsibilities statement set out on page 40, the trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the

preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the Trust's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the Trust or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error; and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Conclusions relating to going concern

We have nothing to report in respect of the following matters in relation to which the ISAs (UK) require us to report to you where:

- the trustees' use of the going concern basis of accounting in the preparation of the financial statements is not appropriate; or
- the trustees have not disclosed in the financial statements any identified material uncertainties that may cast significant doubt about the Trust's ability to continue to adopt the going concern basis of accounting for a period of at least twelve months from the date when the financial statements are authorised for issue.

Other information

The trustees are responsible for the other information. The other information comprises the information included in the Annual Review. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent

with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 and the Charities Accounts (Scotland) Regulations 2006 require us to report to you if, in our opinion:

- adequate accounting records have not been kept by the Trust; or
- sufficient accounting records have not been kept; or
- the Trust financial statements are not in agreement with the accounting records and returns; or
- we have not received all the information and explanations we require for our audit.

Use of our report

This report is made solely to the Trust's members, as a body, in accordance with section 144 of the Charities Act 2011 and regulations made under section 154 of that Act, and section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and regulation 10 of the Charities Accounts (Scotland) Regulations 2006. Our audit work has been undertaken so that we might state to the Trust's trustees those matters we are required to state to them in an Auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Trust's trustees as a body for our audit work, for this report, or for the opinions we have formed.



3 April 2020

Haysmacintyre LLP
Statutory Auditors
10 Queen Street Place
London
EC4R 1AG

Haysmacintyre LLP is eligible to act as an auditor in terms of section 1212 of the Companies Act 2006

Financial Statements

Statement of financial activities – Year to 30 September 2019

	Note	Unrestricted Funds 2019 £'000	Restricted Funds 2019 £'000	Total 2019 £'000	Total 2018 £'000
Income from:					
Donations and legacies	1	3,354	2,290	5,644	3,563
Charitable activities:					
School fees and other educational income	2	10,386	-	10,386	9,597
Other trading activities:					
Trading income	3	132	-	132	131
Other activities for generating funds	4	95	8	103	150
Investments	5	10,666	3,568	14,234	11,754
Other	6	267	-	267	570
Total income		24,900	5,866	30,766	25,765
Expenditure on:					
Raising funds	7	2,689	64	2,753	2,790
Charitable activities:	8				
Parish ministry		580	-	580	1,403
Education		11,225	23	11,248	7,277
Formation		5,715	17,484	23,199	4,345
Social justice and the relief of poverty		1,186	-	1,186	2,463
Care of infirm and elderly members		4,142	-	4,142	3,667
Spirituality		2,355	-	2,355	1,971
Work overseas		581	2,845	3,426	3,746
Total expenditure		28,473	20,416	48,889	27,662
Net (expenditure) before gains on investments		(3,573)	(14,550)	(18,123)	(1,897)
Net gains on investments	13	19,369	6,676	26,045	47,561
Net income/(expenditure)		15,796	(7,874)	7,922	45,664
Transfers between funds	18, 19	(136)	136	-	-
Net movement in funds		15,660	(7,738)	7,922	45,664
Reconciliation of funds:					
Total funds brought forward		485,034	152,701	637,735	592,071
Total funds carried forward		500,694	144,963	645,657	637,735

The accompanying notes form part of these accounts.

Details of comparative figures by fund are disclosed in note 28.

All operations are continuing.

Balance Sheet – as at 30 September 2019

	Note	2019 £'000	2019 £'000	2018 £'000	2018 £'000
Fixed assets:					
Tangible assets	11		74,842		75,663
Investments	13		539,228		491,086
Total fixed assets			614,070		566,749
Current assets:					
Stocks		36		39	
Debtors:					
Amounts falling due after more than one year	14	3,437		3,216	
Amounts falling due within one year	14	1,484		51,421	
		4,921		54,637	
Short term deposits	15	50,481		31,362	
Cash at bank and in hand		11,090		14,902	
Total current assets		66,528		100,940	
Liabilities:					
Creditors: Amounts falling due within one year	16	(33,062)		(27,861)	
Net current assets			33,466		73,079
Total assets less current liabilities			647,536		639,828
Creditors: Amounts falling due after more than one year	17		(1,879)		(2,093)
Total net assets			645,657		637,735
Funds of the charity:					
Restricted funds	18		144,963		152,701
Unrestricted funds:	19				
General fund		4,300		3,266	
Designated funds	20	496,394		481,768	
Total unrestricted funds			500,694		485,034
Total charity funds			645,657		637,735

Approved by and authorised for issue and signed on behalf of Trustees for Roman Catholic Purposes Registered:



K McMillan SJ

Trustee

Approved on: 28 March 2020

The accompanying notes form part of these accounts.

Cash Flow Statement – Year to 30 September 2019

	Note	2019 £'000	2018 £'000
Cash flows from operating activities:			
Net cash inflow/(outflow) from operating activities	A	24,353	(8,563)
Cash flows from investing activities:			
Investment income received		14,234	11,754
Payments to acquire tangible fixed assets		(1,261)	(1,290)
Receipts from the disposal of tangible fixed assets		-	2,056
Payments to acquire fixed asset investments		(163,995)	(91,562)
Receipts from the disposal of fixed asset investments		142,360	94,763
Issue of new long-term loan		(235)	(235)
Net cash flow from investing activities		(8,897)	15,486
Net cash flow from financing activities		-	-
Increase in cash and cash equivalents		15,456	6,923
Cash and cash equivalents at 1 October	B	44,577	37,654
Cash and cash equivalents at 30 September	B	60,033	44,577

A Reconciliation of net income to net cash inflow/(outflow) from operating activities

Net income for the reporting period	7,922	45,664
Adjustments for:		
Depreciation charge	1,555	1,324
Net gains on disposal of tangible fixed assets	-	(307)
Investment income receivable	(14,234)	(11,754)
Net gains on investments	(26,045)	(47,561)
Decrease in stocks	3	17
Decrease in debtors	49,951	8,990
Increase/(decrease) in creditors	5,201	(4,936)
Net cash inflow/(outflow) from operating activities	24,353	(8,563)

B Analysis of cash and cash equivalents

Cash at bank and in hand	11,090	14,902
Short term deposits	50,481	31,362
	61,571	46,264
Bank loans less than 1 year	(195)	(195)
Bank loans more than 1 year	(1,343)	(1,492)
Total cash and cash equivalents	60,033	44,577

Accounting Policies

Basis of preparation

The financial statements have been prepared in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) and the 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 (Charity SORP FRS 102) – effective 1 January 2015.

The functional currency of the charity is considered to be Pounds Sterling (GBP), being the currency of the primary economic environment in which the charity operates.

Basis of consolidation

The results of the Trust's trading subsidiary, as set out in note 3, are incorporated directly into the Trust's accounts.

This is a departure from the consolidation approach required by Charity SORP, however it is immaterial in the view of the Trustees.

Going concern

Having reviewed the funding facilities available to the charity together with the charity's future projected cash flows, the trustees have an expectation that the charity has adequate resources to continue its activities for the foreseeable future and consider that there were no material uncertainties over the charity's financial viability. Accordingly, they also continue to adopt the going concern basis in preparing the financial statements as outlined in the trustees' responsibilities statement.

Critical accounting judgements and key sources of estimation uncertainty

In the application of the accounting policies, trustees are required to make judgements, estimates, and assumptions

about the carrying value of assets and liabilities that are not readily apparent from other sources. The estimates and underlying assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period, or in the period of the revision and future periods if the revision affected current and future periods.

Judgements made by the trustees, in the application of these accounting policies that have significant effect on the financial statements and estimates with a significant risk of material adjustment in the next year are deemed to be in relation to the depreciation rates of tangible fixed assets and are discussed below.

In the view of the trustees, no assumptions concerning the future or estimation uncertainty affecting assets or liabilities at the balance sheet date are likely to result in a material adjustment to their carrying amounts in the next financial year.

Scope

The accounts generally do not include the operating accounts of parish churches in the charge of the Society of Jesus, as these are deemed to be managed as part of the relevant Diocesan Charity. In the same way voluntary aided schools do not form part of these accounts in terms of their operations. However, the property assets utilised by such bodies are in the ownership of the Trust and are therefore reflected within the Trust's accounts.

Both Donhead and St John's Beaumont schools have year-ends of 31 August in line with the academic year.

Income

Income is recognised in the period where there is probability of receipt and the amount can be measured with reasonable certainty.

Legacies are included in the statement of financial activities when the Trust is advised by the personal representative of an estate that payment will be made or property transferred and the amount involved can be quantified.

School fees consist of charges billed by the schools less bursaries and scholarships payable from unrestricted funds.

Investment income relates to dividends from equity and property fund investments, interest and rental income.

Expenditure

Expenditure comprises the following:

- a. The cost of raising funds includes the expenses of the trading company, financing costs, fundraising costs, the fees paid to investment managers in connection with the management of the Trust's listed investments, and the fees paid to property managers in connection with the management of the Trust's investment properties.
- b. The costs of charitable activities comprise expenditure on the Trust's primary charitable purposes as described in the trustees' report.
- c. Grants in support of Jesuit foundations and projects are included in the statement of financial activities when approved and when the intended recipient has either received the funds or been informed of the decision to make the grant and has satisfied all related conditions. Grants approved but not paid at the end of the financial year are accrued for. Grants where the beneficiary has not been informed or has to meet certain conditions

before the grant is released are not accrued for but are noted as financial commitments in the notes to the accounts.

Support costs are apportioned based on the proportion of direct costs for each category.

- d. Governance costs comprise expenditure that is directly attributable to the necessary procedures for compliance with constitutional and statutory requirements.

Employee benefits

Short term benefits including holiday pay are recognised as an expense in the period in which the service is received.

Employee termination benefits are accounted for on an accrual basis and in line with FRS 102.

Foreign currencies

Monetary assets and liabilities in foreign currencies are translated into sterling at the rates of exchange ruling at the balance sheet date. Transactions in foreign currencies are translated into sterling at the rate of exchange ruling at the date of the transaction. Exchange differences are taken into account in arriving at the net movement in funds.

Tangible fixed assets (other than Churches and Schools)

All assets costing more than £2,500 and with an expected life exceeding one year are capitalised.

- Land and buildings: Buildings are being depreciated over 50 years on a straight-line basis; and the land element of the building is not depreciated.
- Vehicles and equipment: Vehicles and equipment are stated at cost less a provision for depreciation. Depreciation is provided on cost over the following periods in order to write off each asset over its estimated useful life:

Equipment	4 years straight line
Vehicles	4 years straight line

Churches and schools

The churches have belonged to the Trust for many years and details of their original cost are not available. All are functioning churches, and as such are neither readily marketable nor can be reliably valued. They are excluded from the balance sheet, as permitted by Charity SORP.

Historical assets

The Trust also holds works of art, book collections, and religious artefacts which currently serve the work of the Trust, but which have been excluded from the balance sheet. A market valuation for such assets is uncertain and, in any case, available only at an expense that appears to the Trustees to be out of proportion to any enhancement of the disclosure properly required in these accounts.

Investments

Investment properties are revalued at open market value annually on 30 September by Youngs RPS, Chartered Surveyors. Listed investments are stated at fair value, obtained by taking the bid price at 30 September, where available.

Realised and unrealised gains (or losses) are credited (or debited) to the Statement of Financial Activities in the year in which they arise.

Stock

Stock is measured at the lower of cost and net realisable value.

Debtors

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

Short term deposits

Short term deposits require at least one day's notice to be withdrawn without penalty.

Cash at bank and in hand

Cash at bank and cash in hand includes cash and short term highly liquid investments.

Creditors and provisions

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

Pension costs

Contributions to employees' personal pension defined contribution schemes are recognised in the statement of financial activities in the year in which they are payable to the scheme.

The Trust's independent schools make contributions to the Teachers' Pension Scheme, which is a defined benefit scheme. The scheme is a multi-employer pension scheme and it is not possible to identify the assets and liabilities of the scheme which are attributable to the charity.

Fund accounting

The restricted funds are monies raised for, and their use restricted to, a specific purpose, or donations subject to donor imposed conditions.

The designated funds are monies set aside out of general funds and designated for specific purposes by the trustees.

The general fund comprises those monies which may be used towards meeting the charitable objectives of the Society at the discretion of the trustees.

Financial instruments

Basic financial instruments are initially recognised at transaction value and subsequently measured at amortised with the exception of investments which are held at fair value. Financial assets held at amortised cost comprise cash at bank and in hand, together with trade and other debtors. A specific provision is made for debts for which recoverability is in doubt. Cash at bank and in hand is defined as all cash held in instant access bank accounts and used as working capital. Financial liabilities held at amortised cost comprise all creditors except social security and other taxes and provisions.

I Donations and legacies

	Total 2019 £'000	Total 2018 £'000
Donations and gifts	3,795	2,465
Legacies	546	327
Grants received	479	192
Covenanted salaries and pensions (see below)	824	579
	5,644	3,563

Covenanted salaries and pensions represent salaries and pensions of members of the Society payable to the Trust under deeds of covenant or Gift aid declarations.

2 School fees and other educational income

	Total 2019 £'000	Total 2018 £'000
Gross school fees receivable	10,834	9,941
Less: Total bursaries, grants and allocations	(573)	(477)
Net school fees receivable	10,261	9,464
School activities and trips	125	133
	10,386	9,597

3 Trading income

	Total 2019 £'000	Total 2018 £'000
Trading income	27	33
Income from trading subsidiary	105	98
	132	131

The Trust has one wholly owned trading subsidiary, St John's Beaumont Development Company Limited, which is incorporated in England and Wales (Registration number 03355298). This company exists principally to hire out the leisure and conference facilities at one of the Trust's two schools. A summary of its trading results is shown below. Audited accounts have been filed with the Registrar of Companies.

	Total 2019 £'000	Total 2018 £'000
St John's Beaumont Development Company Limited		
Turnover	105	98
Cost of sales	(6)	(8)
Gross profit	99	90
Administrative costs	(96)	(84)
Net profit	3	6
Gift aid	-	(6)
Net assets at 30 September	3	-

All profits generated by the company are gift-aided to the charity.

4 Other activities for generating funds

	Total 2019 £'000	Total 2018 £'000
Sale of publications	55	68
Lettings of functional properties	19	65
Gain on foreign exchange	7	-
Misc	22	17
	103	150

5 Investment (income)

	Total 2019 £'000	Total 2018 £'000
Listed investments – equities		
UK	2,608	2,643
Europe	1,047	969
North America	3,927	2,830
Other	1,008	922
	8,590	7,364
Interest receivable	1,210	379
Rental income	2,464	2,182
Property funds	1,970	1,829
	14,234	11,754

All rental income is generated from investment properties within the United Kingdom and all interest is from United Kingdom loans and deposits. Property fund income represents dividends received from money held in Property Fund Income units.

6 Other income

	Total 2019 £'000	Total 2018 £'000
Net gains on sale of tangible fixed assets	-	307
Other educational income	193	164
Sundry income	74	99
	267	570

7 Raising funds

	Total 2019 £'000	Total 2018 £'000
Trading expenses	156	150
Financing costs	87	82
Estate management fees	118	116
Premises costs for investment property	193	223
Investment management fees	1,775	1,760
Fundraising costs	388	436
Legal and professional fees	36	23
	2,753	2,790

8 Charitable activities

	Direct Costs £'000	Support Costs £'000	Grants £'000	Total 2019 £'000	Total 2018 £'000
Parish ministry	28	476	76	580	1,403
Education	4,997	5,829	422	11,248	7,277
Formation	-	3,435	19,764	23,199	4,345
Social justice and the relief of poverty	-	974	212	1,186	2,463
Care of infirm and elderly members	3,148	994	-	4,142	3,667
Spirituality	816	1,539	-	2,355	1,971
Work overseas	336	717	2,373	3,426	3,746
	9,325	13,964	22,847	46,136	24,872
		note 8a	note 8b		

Included within costs of charitable activities are governance cost of £76,634 (2018 - £70,368) which include auditors fees of £36,750 (2018 - £33,400) for the Trust, £25,100 (2018 - £28,050) for the schools, and trustees indemnity insurance premium of £14,784 (2018 - £8,918).

Prior year charitable activities

	Direct Costs £'000	Support Costs £'000	Grants £'000	Total 2018 £'000	Total 2017 £'000
Parish ministry	28	336	1,039	1,403	634
Education	4,883	5,010	(2,616)	7,277	29,687
Formation	-	2,057	2,288	4,345	4,157
Social justice and the relief of poverty	-	644	1,819	2,463	751
Care of infirm and elderly members	2,659	1,008	-	3,667	3,588
Spirituality	784	1,136	51	1,971	2,065
Work overseas	286	468	2,992	3,746	3,269
	8,640	10,659	5,573	24,872	44,151
		note 8a	note 8b		

8a Support costs

	General Admin. £'000	Premises £'000	Other £'000	Total 2019 £'000	Total 2018 £'000
Parish ministry	67	409	-	476	336
Education	2,127	1,941	1,761	5,829	5,010
Formation	443	263	2,729	3,435	2,057
Social justice and the relief of poverty	189	150	635	974	644
Care of infirm and elderly members	663	331	-	994	1,008
Spirituality	425	577	537	1,539	1,136
Work overseas	319	104	294	717	468
	4,233	3,775	5,956	13,964	10,659

General administration includes costs which are incurred directly in undertaking the activity. Central costs (34%) which are not separately identifiable as belonging to a particular activity are allocated on a pro rata basis to total activity costs. Premises costs include building maintenance, insurance, utilities and depreciation. Costs relating to common buildings (22%) are allocated on a pro rata basis to total activity costs. Other costs including welfare and catering, are allocated directly to the activities for which they relate. Common costs (80%) which are not separately identifiable as belonging to a particular activity are allocated on a pro rata basis to total activity costs.

Prior year support costs

	General Admin. £'000	Premises £'000	Other £'000	Total 2018 £'000	Total 2017 £'000
Parish ministry	153	168	15	336	527
Education	1,947	1,932	1,131	5,010	4,607
Formation	534	265	1,258	2,057	1,775
Social justice and the relief of poverty	147	131	366	644	433
Care of infirm and elderly members	683	325	-	1,008	765
Spirituality	414	500	222	1,136	1,212
Work overseas	214	100	154	468	449
	4,092	3,421	3,146	10,659	9,768

8b Grants

	£'000	Total 2019 £'000	£'000	Total 2018 £'000
Parish ministry				
Various Jesuit-led Parishes	76		1,039	
		76		1,039
Education				
Heythrop College	-		(3,892)	
St Ignatius College, Enfield	-		582	
Other grants	422		694	
		422		(2,616)
Formation				
Worldwide Society	17,823		718	
Other Jesuit Provinces	1,597		1,560	
Other	344		10	
		19,764		2,288
Social justice and the relief of poverty				
Jesuit Charitable and Apostolic fund	-		1,500	
Grants to groups	98		258	
Grants to individuals	114		61	
		212		1,819
Spirituality				
Grants to groups/individuals	-		51	
		-		51
Work overseas				
Zimbabwe Province, Society of Jesus	700		1,488	
Guyana Region, Society of Jesus	510		524	
South Africa Region, Society of Jesus	206		536	
Harare Diocese, Zimbabwe	148		118	
Other Jesuit Provinces	-		9	
Other various grants overseas	809		317	
		2,373		2,992
Total grants payable		22,847		5,573

9 Staff costs and trustees' remuneration and costs

9a Staff costs

	Total 2019 £'000	Total 2018 £'000
Wages and salaries	8,898	8,299
Termination payments	91	28
Social security costs	879	804
Pension contributions	758	705
	10,626	9,836
Total employment costs of key management personnel (included above)	651	588
	2019 Number of employees	2018 Number of employees
Teaching staff	124	139
Administration and domestic staff	237	221
	361	360

The number of employees who earned £60,000 per annum or more (including taxable benefits but excluding employer's pension contributions) during the year was as follows:

	2019	2018
£60,001 - £70,000	5	2
£70,001 - £80,000	1	2
£80,001 - £90,000	2	2
£90,001 - £100,000	1	-
£100,000 +	1	1

Pension contributions are paid in respect of the ten employees above, who are paid in excess of £60,000. In respect of four of the employees, contributions are made into the Teachers' Pension Scheme, a defined benefit scheme. In the case of the other six employees, contributions are made into a defined contribution scheme. The total contributions made were £50,602 (2018 - £29,490) into the Teachers' Pension Scheme and £31,257 (2018 - £28,859) into the defined contribution scheme.

9b Trustees' remuneration and costs

As members of the Society, the trustees' living and personal expenses during the year were borne by the Trust. There were no meeting expenses incurred this year (2018 - Nil). No remuneration for services were paid to the trustees (2018 - Nil).

With authority from the Charity Commission, the Trust has purchased insurance to protect the Trust from any loss arising from the neglect or defaults of its trustees, employees and agents and to indemnify the trustees or other officers against the consequences of any neglect or default on their part. The insurance premium paid by the charity during the year totalled £14,784 (2018 - £8,918) and provides cover of up to a maximum of £5 million (2018 - £5 million).

10 Taxation

The 1921 and 1929 Trusts of the Society of Jesus in Great Britain and the Society of Jesus Charitable Trust are registered charities and are not liable for income tax or capital gains tax on income and gains derived from their charitable activities, as they fall within the various exemptions available to registered charities.

11 Tangible fixed assets

	Freehold Functional Land and Buildings £'000	Vehicles and Equipment £'000	Total £'000
At cost or valuation			
At 1 October 2018	89,708	3,733	93,441
Additions at cost	769	492	1,261
Disposals	(579)	-	(579)
At 30 September 2019	89,898	4,225	94,123
Depreciation			
At 1 October 2018	15,852	1,926	17,778
Charge for the year	1,070	485	1,555
Disposals	(52)	-	(52)
At 30 September 2019	16,870	2,411	19,281
Net book value			
At 30 September 2019	73,028	1,814	74,842
At 30 September 2018	73,856	1,807	75,663

The properties in total (including investment properties £50.3m and tangible fixed assets £73m) are currently insured for a value of £535.2m, while the net book value of these properties held by the Society at the year end was £122.1m.

12 Churches and historical assets

The Trust is the legal owner of the following properties which are not valued for the purposes of these accounts.

Boscombe	Corpus Christi Church
Edinburgh	Sacred Heart Church
Mayfair, London	Farm Street Church
Manchester	Holy Name Church
Preston	St Wilfrid's Church, Presbytery and Parish Hall
Stamford Hill, London	St Ignatius Church
Wimbledon, London	Sacred Heart Church
Sheffield	Church of the Immaculate Conception (Spinkhill)
Hurst Green, Lancashire	St Peter's Church (Stonyhurst)

The churches have belonged to the Trust for many years and details of their original cost are not available. All are functioning churches and as such are neither readily marketable nor can be reliably valued and are therefore excluded from the balance sheet.

The Trust also holds works of art, book collections and religious artefacts which currently serve the work of the Trust, but which have been excluded from the balance sheet. A market valuation for such assets is uncertain and, in any case, available only at an expense that appears to the Trustees to be out of proportion to any enhancement of the disclosure properly required in these accounts.

13 Investments

	Total 2019 £'000	Total 2018 £'000
Market value at 1 October	491,086	446,506
Less: disposal proceeds	(144,907)	(79,735)
Add: additions at cost	163,995	91,562
Net other movements	3,009	(14,808)
Net investment gains	26,045	47,561
Market value at 30 September	539,228	491,086

Investments held at 30 September comprised the following:

Listed investments:		
Equities:		
UK	180,097	131,708
Europe	46,274	56,498
North America	170,928	154,142
Other	28,935	50,420
	426,234	392,768
Property Fund units	41,610	42,018
Market value of listed investments	467,844	434,786
UK investment properties	50,343	48,286
Cash balances held by investment managers	21,041	8,014
	539,228	491,086

14 Debtors

	Total 2019 £'000	Total 2018 £'000
Amounts falling due after more than one year		
Long-term loan (see below)	3,400	3,165
Other debtors (see below)	37	51
	3,437	3,216
Amount falling due within one year		
School fees and other educational services	123	98
Accrued investment income	31	20
Prepayments and accrued income	1,007	655
Other debtors (see below)	323	50,648
	1,484	51,421
Total debtors	4,921	54,637

A further loan of £235,000 was made during the year to Mount St Mary's College (a school transferred to a separate trust in 2007). This loan, now at £3,400,000 is repayable on a quarterly basis with the first instalment being 30 November 2021. The loan incurs interest at 1.5% points above base rate and is due for repayment by 31 May 2034. The loan is secured by a first legal mortgage over the freehold property of the College.

15 Short Term Deposits

	Total 2019 £'000	Total 2018 £'000
Short term deposits	50,481	31,362

16 Creditors: Amounts falling due within one year

	Total 2019 £'000	Total 2018 £'000
Bank overdrafts and loans	195	195
School fees and other educational charges	1,286	1,219
Taxation and social security	170	165
Held on behalf of other Jesuit Provinces and projects	8,349	8,373
Grants committed	19,776	15,601
Expense creditors, accruals and other	3,286	2,308
	33,062	27,861

17 Creditors: Amounts falling due after more than one year

	Total 2019 £'000	Total 2018 £'000
Bank loans (see below)		
Due within two to five years	781	781
Due after more than five years	562	711
	1,343	1,492
School fees and other educational charges	536	601
	1,879	2,093

Donhead School has two HSBC bank loans. The first loan was taken out in 2011 for £800,000 at an interest rate of 2% points above base rate. By the end of the year £374,746 (2018: £431,617) was outstanding. The loan will be fully repaid by November 2025. The second loan was also in respect of building works. By the end of the year £1,128,656 (2018: £1,255,798) was outstanding. The loan will incur interest at 2.1% points above base rate and is due for repayment by 2029.

The loans are secured by a first legal mortgage over the freehold property and by a guarantee of £240,000 given by the Trustees for Roman Catholic Purposes Registered to HSBC Bank.

18 Restricted funds

	At 1 Oct 2018 £'000	Income £'000	Expenditure £'000	Gains / (losses) £'000	Transfers between funds £'000	At 30 Sept 2019 £'000
Beaumont Educational Trust	288	9	-	-	-	297
Guyana	15,532	377	(510)	711	48	16,158
Harare	14,911	419	(148)	616	-	15,798
Mission funds	3,384	1,098	(1,447)	-	88	3,123
South Africa	14,251	357	(180)	658	-	15,086
Von Hugel	5	-	-	-	-	5
Young Priests (Osterley)	62,992	2,507	(17,484)	2,796	-	50,811
Zimbabwe	41,331	1,091	(639)	1,895	-	43,678
Other restricted funds	7	8	(8)	-	-	7
	152,701	5,866	(20,416)	6,676	136	144,963

18 Restricted funds (continued)

Restricted funds are subject to specific conditions imposed by the donors.

- ◆ The Beaumont Educational Trust exists to provide financial assistance for the education of boys and young men, especially those who have a connection with the former Beaumont College, a Jesuit establishment. It is a separate charity, registered no. 309142, the trustees of which are Trustees for Roman Catholic Purposes Registered.
- ◆ The Guyana, South Africa and Zimbabwe funds exist to support the works of these Regions of the Society of Jesus. These are for the purposes of education, the relief of poverty and the promotion of religion.
- ◆ The Harare fund exists to support the works of the Roman Catholic archdiocese of Harare in the Zimbabwe region of the Society of Jesus. This is for the purposes of education, the relief of poverty and the promotion of religion.
- ◆ Mission funds promote missionary works in overseas countries by making grants to Christian missions, especially those of the Society of Jesus.
- ◆ The Von Hugel fund exists for the advancement of the Roman Catholic religion in the area of the Roman Catholic parishes of Boscombe and Iford near Bournemouth. These funds were part of a separate charity, registered no. 278966, but are now subject to a Uniting Direction and the charity is therefore accounted for as part of the Society of Jesus.
- ◆ The Young Priests (Osterley) fund exists to encourage and support candidates for priesthood.
- ◆ Other restricted funds represent one-off donations given for a number of specific purposes.

19 Unrestricted Funds

	At 1 Oct 2018 £'000	Income £'000	Expenditure £'000	Gains/ (Losses) £'000	Transfers between funds £'000	At 30 Sept 2019 £'000
General funds	3,266	2,183	(4,371)	3,222	-	4,300
Designated funds (note 20)	481,768	22,717	(24,102)	16,147	(136)	496,394
	485,034	24,900	(28,473)	19,369	(136)	500,694

20 Designated funds

Included within the unrestricted funds are designated funds totalling £496,394,000. These are amounts which have been set aside for specific purposes by the trustees and are as follows:

	At 1 Oct 2018 £'000	Income £'000	Expenditure £'000	Gains/ (Losses) £'000	Transfers between funds £'000	At 30 Sept 2019 £'000
Foundations	42,813	1,181	(2,741)	1,765	150	43,168
Apostolic Works	94,438	1,405	(1,782)	2,909	-	96,970
Formation	146,817	2,499	(3,304)	6,489	-	152,501
Old Age	82,687	2,644	(2,767)	3,458	(48)	85,974
Bellarmino	68,354	1,733	(866)	1,085	(150)	70,156
Personnel support and training	10,211	222	(191)	407	-	10,649
Jesuit Development	872	18	(14)	29	-	905
Jesuit Communities	16,655	40	(268)	-	-	16,427
Local Trusts	2,324	11	-	-	-	2,335
Other educational funds	13,378	12,629	(11,467)	-	(88)	14,452
Society of Jesus Charitable Trust (1990 Trust)	1,049	335	(702)	5	-	687
Allocated investment gains	2,170	-	-	-	-	2,170
	481,768	22,717	(24,102)	16,147	(136)	496,394

- ◆ The Foundations fund is for the establishment of new work and the support of works that cannot fully fund themselves. This support may be for capital building projects or for supplementing the income of already operational projects.
- ◆ The Apostolic Works fund is used to promote and support various works of the Jesuits in Britain.
- ◆ The Formation fund exists for the education and training of members of the Jesuits in Britain and the Worldwide Society.
- ◆ The Old Age fund is for the care of the elderly and sick members of the Jesuits in Britain.
- ◆ The Bellarmine Fund has been used in recent years primarily for the support of Heythrop College, although it was not designated solely for that purpose, being for other similar theological educational activities. It is being used to support the Heythrop Library and other follow-on legacy work.
- ◆ The Personnel support and training fund exists to develop and train lay people who have shown commitment to the work of the trust, especially in Ignatian formation.
- ◆ The Jesuit Development fund receives a small number of covenanted donations for various projects of the Jesuits in Britain.
- ◆ The Jesuit Communities fund represents the net book value of freehold land and building used by our various communities.
- ◆ The Local Trusts fund has been established to provide for the intended endowment of two independent schools.
- ◆ Other educational funds are used for school and other educational activities.
- ◆ The Society of Jesus Charitable Trust fund exists to further the promotion of charitable work for the time being carried out by the Society of Jesus. This usually consists of making grants for the promotion of religion and educational purposes.
- ◆ The allocated investment gains fund was created in 2012-2013 for those Jesuit Works which hold investment funds in order to stabilise their income from year to year, avoiding undue volatility in the existing markets and ensuring Works' continued operations in such time.

21 Analysis of Net Assets between funds

	Unrestricted Funds		Restricted Funds £'000	Total 2019 £'000
	General Funds £'000	Designated Funds £'000		
Fund balances at 30 September are represented by:				
Tangible fixed assets	-	74,834	8	74,842
Investments	-	375,761	163,467	539,228
Net current assets	4,300	47,678	(18,512)	33,466
Creditors: amounts falling due after more than one year	-	(1,879)	-	(1,879)
Total net assets	4,300	496,394	144,963	645,657

Prior year analysis of Net Assets between funds

	Unrestricted Funds		Restricted Funds £'000	Total 2018 £'000
	General Funds £'000	Designated Funds £'000		
Fund balances at 30 September are represented by:				
Tangible fixed assets	-	75,660	3	75,663
Investments	-	336,401	154,685	491,086
Net current assets	3,266	71,800	(1,987)	73,079
Creditors: amounts falling due after more than one year	-	(2,093)	-	(2,093)
Total net assets	3,266	481,768	152,701	637,735

22 Pension commitments*Defined benefit scheme*

Retirement benefits for teaching staff of the Trust are provided by the Teachers' Pension Scheme ("the TPS") which are funded by contributions from the Society's schools and their employees.

Contributions to the defined benefit schemes are charged in the Statement of Financial Activities so as to spread the cost of the pensions over the employees' working lives with the schools. This amounted to £424,083 (2018 - £390,063) payable to the TPS.

The TPS is an unfunded multi-employer defined benefits pension scheme governed by The Teachers' Pensions Regulations 2010 (as amended) and The Teachers' Pension Scheme Regulations 2014 (as amended). Members contribute on a "pay as you go" basis with contributions from members and the employer being credited to the Exchequer. Retirement and other pension benefits are paid by public funds provided by Parliament.

The employer contribution rate is set by the Secretary of State following scheme valuations undertaken by the Government Actuary's Department. The most recent actuarial valuation of the TPS was prepared as at 31 March 2016 and the Valuation Report, which was published in March 2019, confirmed that the employer contribution rate for the TPS would increase from 16.4% to 23.6% from 1 September 2019. Employers are also required to pay a scheme administration levy of 0.08% giving a total employer contribution rate of 23.68%.

The 31 March 2016 Valuation Report was prepared in accordance with the benefits set out in the scheme regulations and under the approach specified in the Directions, as they applied at 5 March 2019. However, the assumptions were considered and set by the Department for Education prior to the ruling in the 'McCloud/Sargeant case'. This case has required the courts to consider cases regarding the implementation of the 2015 reforms to Public Service Pensions including the Teachers' Pensions.

22 Pension commitments (continued)

On 27 June 2019 the Supreme Court denied the government permission to appeal the Court of Appeal's judgment that transitional provisions introduced to the reformed pension schemes in 2015 gave rise to unlawful age discrimination. The government is respecting the Court's decision and has said it will engage fully with the Employment Tribunal as well as employer and member representatives to agree how the discriminations will be remedied.

The TPS is subject to a cost cap mechanism which was put in place to protect taxpayers against unforeseen changes in scheme costs. The Chief Secretary to the Treasury, having in 2018 announced that there would be a review of this cost cap mechanism, in January 2019 announced a pause to the cost cap mechanism following the Court of Appeal's ruling in the McCloud/Sargeant case and until there is certainty about the value of pensions to employees from April 2015 onwards.

In view of the above rulings and decisions the assumptions used in the 31 March 2016 Actuarial Valuation may become inappropriate. In this scenario, a valuation prepared in accordance with revised benefits and suitably revised assumptions would yield different results than those contained in the Actuarial Valuation.

Until a remedy to the discrimination conclusion has been determined by the Employment Tribunal it is not possible to conclude on any financial impact or future changes to the contribution rates of the TPS. Accordingly no provision for any additional past benefit pension costs is included in these financial statements.

Defined contribution scheme

The Society of Jesus Trust also makes contributions to defined contribution schemes for the benefit of its employees. This amounted to £334,376 (2018 - £315,145).

23 Connected charities and related parties

The Trustees for Roman Catholic Purposes Registered is also the trustee for the Society of Jesus Charitable Trust (1990 Trust - registered charity no. 803659).

The 1990 Trust uses the same principal office and has objects similar to many of those of the 1921 and 1929 Trusts. It is funded from the 1921 and 1929 Trusts by loans, and the amount due from the 1990 Trust at 30 September is £28,292,670 (2018 - £28,082,055).

There are no disclosable related party transactions occurring during 2019 (2018 : none).

24 Financial commitments

	Total 2019 £'000	Total 2018 £'000
The total commitments in respect of operating leases are as follows:		
Due within one year	42	51
Due within two to five years	70	44
	112	95

25 Capital commitments

Capital commitments at the end of the year were £981,000 (2018 - £78,000). This relates to the refurbishment at St Beuno's Spirituality Centre (£955,000) and the London Jesuit Centre (£26,000)

26 Contingent assets

Contingent assets have arisen from the transfers of schools to separate charitable assets.

On 1 September 2009 Stonyhurst College and its trading subsidiary Stonyhurst College Development Limited were transferred to a separate charitable trust. Included in the transfer were buildings valued at £18,100,000, a £4,000,000 transfer of restricted funds and a £21,700,000 cash transfer. This cash transfer was made with a condition that £16,000,000 remains in the Balance Sheet of Stonyhurst New Trust and is a contingent asset repayable to The Society of Jesus if the activities of Stonyhurst College change.

£1,800,000 is also held by Mount St Mary's College (a school transferred to a separate trust in 2007) and is repayable to The Society of Jesus in certain circumstances, such as closure.

27 Ultimate control

The Declaration of Trust dated 20 March 1929 provides that new trustees shall be appointed by resolution of the existing trustees and therefore, in the opinion of the trustees, the trustees are the ultimate controlling party.

28 Post Balance Sheet events

In recent days, the impact of the Coronavirus (Covid-19) has been felt on stock markets right across the world. It is uncertain to know what course the spread of the pandemic will take in the coming months. The value of our investments are at levels of between 10% and 20% below the values of our investments as at the year-end i.e. 30th September. Trustees had kept a relatively high proportion of its investments in cash, so this should minimise the impact, especially as the Trust views itself as a long-term investor. During the next year or so there are significant expenditures planned for various works in the Trust. The cash flow is deemed more than sufficient. Nevertheless some of these projects could be deferred if this emergency situation goes on for a very significant time.

29 Prior year statement of financial activities-2018

	Unrestricted Funds 2018 £'000	Restricted Funds 2018 £'000	Total 2018 £'000
Income from:			
Donations and legacies	2,612	951	3,563
Charitable activities:			
School fees and other educational income	9,597	-	9,597
Other trading activities:			
Trading income	131	-	131
Other activities for generating funds	142	8	150
Investments	8,267	3,487	11,754
Other	570	-	570
Total income	21,319	4,446	25,765
Expenditure on:			
Raising funds	2,701	89	2,790
Charitable activities:			
Parish ministry	536	867	1,403
Education	6,996	281	7,277
Formation	3,558	787	4,345
Social justice and the relief of poverty	2,443	20	2,463
Care of infirm and elderly members	3,667	-	3,667
Spirituality	1,971	-	1,971
Work overseas	372	3,374	3,746
Total expenditure	22,244	5,418	27,662
Net income/(expenditure) before gains on investments	(925)	(972)	(1,897)
Net gains on investments	35,249	12,312	47,561
Net income	34,324	11,340	45,664
Transfers between funds	(133)	133	-
Net movement in funds	34,191	11,473	45,664
Reconciliation of funds:			
Total funds brought forward	450,843	141,228	592,071
Total funds carried forward	485,034	152,701	637,735

30 Prior year summary of movement in funds

Restricted funds	At 1 Oct 2017 £'000	Income £'000	Expenditure £'000	Gains/ (Losses) £'000	Transfers between funds £'000	At 30 Sept 2018 £'000
Beaumont Educational Trust	283	8	-	(3)	-	288
Guyana	14,314	381	(524)	1,313	48	15,532
Harare	13,472	420	(118)	1,137	-	14,911
Mission funds	3,388	790	(911)	-	117	3,384
South Africa	13,205	367	(536)	1,215	-	14,251
Von Hugel	5	-	-	-	-	5
Young Priests (Osterley)	57,340	1,462	(936)	5,158	(32)	62,992
Zimbabwe	38,327	994	(1,488)	3,498	-	41,331
Other restricted funds	894	24	(905)	(6)	-	7
	141,228	4,446	(5,418)	12,312	133	152,701

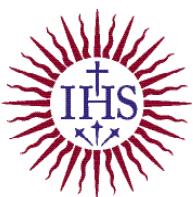
Unrestricted Funds	At 1 Oct 2017 £'000	Income £'000	Expenditure £'000	Gains/ (Losses) £'000	Transfers between funds £'000	At 30 Sept 2018 £'000
General funds	2,484	401	(4,276)	4,657	-	3,266
Designated funds	448,359	20,918	(17,968)	30,592	(133)	481,768
	450,843	21,319	(22,244)	35,249	(133)	485,034

Designated funds	At 1 Oct 2018 £'000	Income £'000	Expenditure £'000	Gains/ (Losses) £'000	Transfers between funds £'000	At 30 Sept 2019 £'000
Foundations	39,525	926	(1,544)	3,874	32	42,813
Apostolic Works	89,086	1,672	(1,677)	5,357	-	94,438
Formation	135,317	2,497	(2,120)	11,123	-	146,817
Old Age	76,449	2,368	(2,728)	6,646	(48)	82,687
Bellarmino	63,615	679	2,057	2,003	-	68,354
Personnel support and training	9,317	216	(73)	751	-	10,211
Jesuit Development	817	17	(16)	54	-	872
Jesuit Communities	16,916	32	(293)	-	-	16,655
Local Trusts	2,314	10	-	-	-	2,324
Other educational funds	12,469	12,016	(10,990)	-	(117)	13,378
Society of Jesus Charitable Trust (1990 Trust)	364	485	(584)	784	-	1,049
Allocated investment gains	2,170	-	-	-	-	2,170
	448,359	20,918	(17,968)	30,592	(133)	481,768







A window at the London Jesuit Centre

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Registered charity numbers:
England & Wales 230165
Scotland SC040490

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 Designed by: www.rfportfolio.com
 Printed by: www.impressprint.co.uk
 Front cover: Fr Dushan Croos SJ professing
 his Final Vows at Farm Street Church
 on the feast of St Joseph, principal patron
 of the Society of Jesus



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Carbon Balanced Publication Printer
Impress Print Services Limited Reg. 2220