

CATHOLIC DIOCESE OF PORTSMOUTH

ANNUAL REPORT



2019/2020

Bringing people closer to Jesus Christ through His Church

CALLED



Come Follow Me



FORMED



If you are
what you
you will set t

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you should be
the world
on fire



SENT



Go
and make disciples of all
nations



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ANNUAL REPORT 2020

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Bishop's Report

Twenty centuries ago on the shores of Lake Galilee, a Man of God appeared, a miracle-worker, a Person of extraordinary fascination and mystery with a profound knowledge of Scripture and Jewish tradition, and with authority and wisdom. He chose and called to Himself a small band of disciples, whom over the next years He taught and formed. He was arrested and cruelly put to death, but three days later, rose from the dead and appeared to His disciples. He sent the Spirit of God into their hearts and charged them to go out into all humanity to preach the Good News: that in Him, died and risen, a new world-order has arrived, the gift of eternal life, the gift of salvation from suffering, sickness, sadness and death. That Message the Church in our Diocese of Portsmouth seeks to proclaim today to the people of our time and place - a task summed up in our mission statement: Bringing People Closer to Jesus Christ through His Church.

Our Mission for the period 2020 - 2030 is to:

1. Go out on mission to all
2. Convert Catholics
3. Be totally dependent on the Holy Spirit
4. Become outward looking servants

There are three areas of focus:

1. Vocations
2. Youth
3. Prioritising Resources

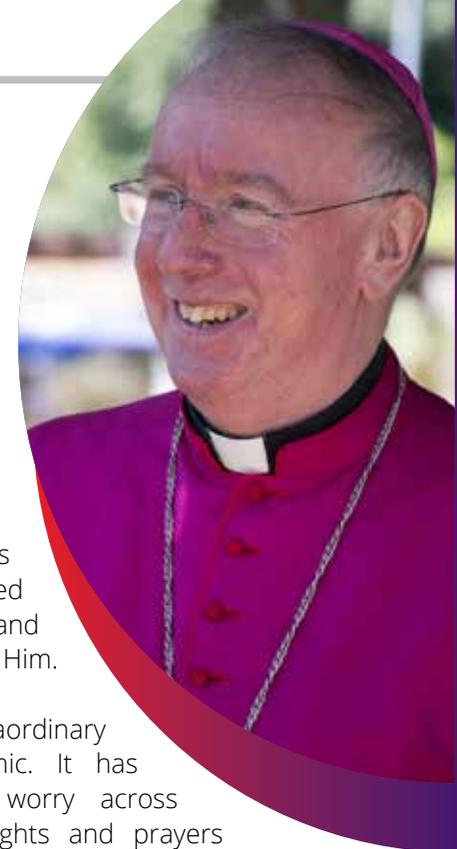
Jesus's three-fold method of calling – forming – sending is the structure of our Diocese (the 'Framework for Collaboration') with its three vicariates of Vocation (calling), Education

(formation) and Evangelisation (sending). These three vicariates, with their teams and departments, seek to carry out the work and mission of our Diocese, serving its clergy and lay, its parishes and schools. They are there to help us all grow in discipleship of Christ: as disciples called by Him, disciples formed by Him (a life-long process) and disciples sent out on mission by Him.

2020 has been an extraordinary year with the COVID pandemic. It has brought much sadness and worry across our faith community. My thoughts and prayers are with our parish families who have lost loved ones.

Our faith is a great comfort during challenging times, providing solace and hope. I would like to thank our priests and the scores of volunteers for all they have done to keep churches open and to make the Sacraments, teaching and communion of the Church available. I also acknowledge their creativity. Much activity has gone online, liturgies livestreamed and prayer-groups and bible-study 'zoomed.' I am grateful to our schools, heads and teachers in particular, for all they have done, not least the many heart-warming acts of care and support for poorer families and individuals.

As the bishop, I have been supporting our priests directly by phone and zoom as well as in person where possible and have been closely involved in the formation-programme of our students in the House of Discernment at Sacred Heart, Fareham. I have continued to communicate personally with our faithful by developing the weekly Enews and have initiated



a new diocesan quarterly newsletter Viva Voce which is distributed to schools and parishes throughout the diocese. I have also begun releasing short video messages with catechesis on various aspects of our Catholic faith and worship as well as delivered talks and papers on the New Evangelisation, the Origins of the Bible, the Church in Today's Society, Covid the Spiritual Impact, the Future of Catholic Education and on Living Laudato Si. Also, a real highlight of the year for me was the ordination of a new priest for our Diocese, Fr Matthew King, and two transitional deacons, Anthony Fyk and Paul Nwune.

As the Church emerges from the pandemic, our Diocese has enormous potential. On behalf of the Lord, I express profound gratitude to everyone for their work, and not least to my closest collaborators, the Bishop's Council formed of the two Vicars General, Canons Paul Townsend and Michael Dennehy, and the three Episcopal Vicars, Fr. Rob Stewart, Fr. PJ Smith and Fr. Mark Hogan. I am especially thankful to Heather Hauschild, the Chief Operating Officer, to Chris Smith, Director of Communications, to our diocesan support and administration team, and to those who work with me in Bishop's Office: Fr. Philip Carroll, Kirsten McGuire and Deacon Craig Aburn.

Let us pray that all this good work done for the Lord will bear much fruit, helped by the intercession of our dear patrons Mary Immaculate, St. Edmund of Abingdon and Bl. Pier Giorgio Frassati.

In Corde Iesu

+ Philip

Bishop of Portsmouth



 **Bringing people
closer to Jesus Christ
through His Church** 

Chief Operating Officer's Statement

Heather Hauschild

Chief Operating Officer

Our work so far

This has been my first full year as Chief Operating Officer, and I am grateful for the opportunity to reflect on all the progress we have made in the last twelve months.

It almost goes without saying that this year has been particularly challenging for us all; the impact of COVID-19 on our communities and the practice of our faith has been profound. Our parishes have risen to the challenges presented by the pandemic. They have been innovative and resourceful in adapting the ways in which we serve the community and bear witness to the Gospel to the new reality.

The many examples contained in this report are a testament to the generosity and resilience with which the people of our Diocese have responded to the crisis, for which

we should be justly proud. While there are promising signs that within the next year, life will be able to return to normal, it is likely that we will be dealing with the long-term effects of the pandemic for years to come.

The Department for Support and Administration has also had to adapt our practices and work due to COVID. We have had to reorder our priorities in light of this and I wanted to highlight the following successes over the last 12 months:

Our first priority has been to support parishes as effectively as we can, especially in providing guidance and advice to navigate the constantly changing government COVID regulations. This has helped to ensure the safety of our parishioners and where possible, continue to deliver Mass in our communities.

We introduced a new IT system across the Diocese

to enable home-working and virtual meetings and managed the complex staffing arrangements that needed to be made, when a number of our employees across the Diocese were placed on furlough. This government scheme alleviated a considerable amount of cost pressure for parishes while our churches were closed and income was substantially reduced. We are thankful to our generous and loyal employees who have been so understanding and flexible in these uncertain times.

A Safeguarding review was undertaken in January 2020 by the Social Care Institute for Excellence (SCIE) to assess the robustness of our arrangements and to identify areas for improvement. An action plan was developed, and good progress has been made in the implementation of the suggestions, most notably in the delivery of a revised training programme for clergy and DBS online, which means that the backlogs in securing DBS certificates have been eliminated.

We are delighted to have recruited some excellent professionals to our Safeguarding Commission, to support us in our ongoing work to ensure the protection of the most vulnerable members of our community. We are now working to implement the recommendations of a review authorised by the Catholic Bishops Conference for England and Wales as part of a 'One Church' model. This work will formalise the Safeguarding Commission as a subcommittee of the Trustees.



I am particularly proud of the excellent work that our Estates and Fundraising Development team has done to raise £1.2 million at the time of writing, from applications to grant and trust making bodies. Their work has enabled us to finance a variety of local projects including the work of Caritas Portsmouth, our Parish Social Outreach groups, and the local food banks. We have also been able to support the care and restoration of some of our listed buildings. This funding has been a great help to our parish communities.

Since the start of the pandemic I have been participating in the local area Faith Working Group, which was established to include all of the faith communities in Hampshire in the response to the challenges we are all facing. My priority has been to work with the authorities and the representatives of other faith groups to ensure the needs of our community were considered when decisions were made.

I have also been engaging closely with our Hospital Chaplains and the NHS trusts in which they operate. We have worked hard during the pandemic to raise the

profile of Catholic Chaplaincy in our hospitals, so that the efforts of our Chaplains in providing support and consolation to the sick and in bringing the sacraments to those in end-of-life care was recognised as an essential part of the care provided. I am also pleased that we have been able to negotiate a Service-Level Agreement with the University Hospital Southampton Trust to strengthen the provision of hospital chaplaincy in Southampton.

Last year we were able to meet with clergy and members of local finance committees, to discuss the financial position of the Diocese in greater detail. The financial report describes the reality that we are facing a challenge both centrally and, in most parishes, because over the last few years, income has not kept pace with expenditure. Weekly Mass attendance has decreased year-on-year, and average contributions per-head have also gone down. The COVID pandemic has exacerbated the existing problem because our churches have been closed or severely restricted for an extended period of time.

While the economic outlook is precarious, we are at a turning-point. We have an opportunity to strengthen our Diocese, through the commitment, generosity and self-sacrifice of our clergy and lay faithful. Our attention is now firmly focused on the future and ensuring our faith community has the resources in place to achieve our priorities.

This will allow us to address those areas which are central to our Diocese such as providing continued support for clergy, including the increasing number of priests coming to retirement age, investing in the ongoing formation of the laity, and ensuring the upkeep of our parishes and refurbishment of our churches. As a result, we can look forward to a Catholic community which can care for those in need, with a priesthood that is supported and renewed by new vocations, and parishes that are sufficiently resourced.

Our Workforce

Our Diocese is a large charitable organisation, which employs dedicated professionals to support the efforts of the Bishop, Priests, Deacons, and Lay People working to Bring People Closer to Jesus Christ through His Church. The diocesan offices at St Edmund's House, on the Cathedral site in Portsmouth, houses the 'Department for Support and Administration'. The Department provides extensive support to the diocesan curia and to our parishes in areas such as pastoral care, capacity building and governance. We employ approximately thirty members of staff on a full and part-time basis

across eight departments. The Chief Operating Officer has overall responsibility for the work of the Department for Support and Administration and is the Canonical Finance Officer for the diocese. (Can. 494)

The running cost of the central departments is covered by regular donations and a percentage of parish contributions for which we are extremely grateful. The annual parish levy is calculated based on the previous year's income and helps to ensure the Diocese can continue to support its entire faith

community. Other costs such as insurance, legal support and money paid to the national Bishops' Conference of England and Wales are also funded by these income streams. The work of these internal functions are imperative for the ongoing management and governance of the Diocese of Portsmouth.

We work closely with other dioceses to share learning best practice and develop collaborative solutions to some of the common issues we face.

Our priorities for the coming year

In the next year, our attention must continue to be on our central mission; Bringing People Closer to Jesus Christ through His Church. We will be building a plan for the next ten years, focused on spiritual renewal. From an administrative standpoint, we will be concentrating on the responsible management of the Church's material and financial assets to support our core mission. To inform this process, we will be closely considering the results of our diocesan survey, which yielded over 1,800 responses, along with our clergy survey (to be conducted later this year). The priorities detailed below will enhance the faith of each community and the lives of our parishioners.

Our detailed priorities for the next year are as follows:

- Contribute to the development of the 10-year plan.
- Finalise our Living Our Faith Campaign (please see insert attached), with all remaining funds now assigned to projects across the Diocese.
- Establish a new fundraising initiative for the support of clergy and men in all stages of the priesthood, laity formation and to support parish recovery post-COVID.
- Maintain our focus on grant and trust applications to build new income streams which will assist across the broad range of our missionary activity.
- To Fully implement the 'One Church' model for safeguarding and meet the standards for the safeguarding of vulnerable people set out in that model.
- Progress the many areas of estate development that have already begun so that assets can be used appropriately to support the mission of the church.

- In collaboration with the Caritas Board and a dedicated group of volunteers, to produce a detailed environmental strategy so that the aspirations and challenges described in "Laudato Si" can be realised in our Diocese
- Procure a new finance system to replace our existing arrangements so that we can more effectively support parishes with their financial management and provide the necessary tools for central reporting and oversight.
- Continue to improve our governance, revise outdated policies and specifically ensure our Information governance and cyber security arrangements are as robust as possible.
- Address the ongoing need for training and support for clergy, employees, and volunteers. We have been asked to prioritise mental health support and signposting and IT training as well as routine safeguarding and other practical training.
- Continue to work in partnership with others including in hospitals, universities, local authorities and other faith groups. We will also continue working and sharing best-practice with the other dioceses in England and Wales.

I am grateful for the hard work of the Department for Support and Administration over the last twelve months, and for the work of our staff across the Diocese. There is still a great deal of work to be done, both to weather the current challenges and to take advantage of the opportunities over the next ten years. With a spirit of Faithfulness to Christ's call to follow Him and a generous response to the needs of His Church, we will safeguard the future of our community. I commend this annual report to you and ask you please to pray for our Diocese and for us as we continue our work for the Glory of God.





30,327

Weekly Parish Attendance

664*

New Baptisms

255*

Catechumens

151*

Marriages

214*

Confirmations

1,111*

Deaths

1,259*

First Holy Communions

Parish Life

At the heart of the community

The parish is the central place in which the Catholic community comes together to celebrate and share in the Mass, liturgies, sacraments, formation and life of the Church.

The Diocese's 87 parishes and 71 Catholic schools lie at the heart of communities across Hampshire, Berkshire, Oxfordshire, the Isle of Wight and the Channel Islands, reaching out to 3.2 million people each year.

It is through the parish network that the diocese meets its charitable objectives, aided by the Framework for Collaboration teams and supported by the central curial services.

Parishes provide an inclusive hub for people of all walks of life to meet, form friendships, receive religious services, education and formation and provide a structure for parishioners to reach out to the wider community to serve in acts of social action, in particular to serve the poor, the isolated, the vulnerable and those most in need.

It is through the provision of the liturgies and sacraments that Catholics are sustained to live out their faith, personally

We provide vital Home Care Services, working with other Christians and other Faiths as well as voluntary agencies Southampton

encountering Christ through the Eucharist and in the sacrament of reconciliation.

Parishes deliver a host of events, initiatives and programmes both within the Christian community and to the wider community. Clergy and parishioners engage across various vital areas. For example, offering chaplaincy to 51 Hospitals, providing vital care and support, often in times of great difficulty or in end of life situations. Chaplaincy is provided to 4 prisons, comprising a prison population of 2,071 inmates with various spiritual needs. Minority group chaplaincy provides support to many people from different nationalities including Poland, India, Philippines, Nigeria, Ghana, Cameroon, Venezuela and China, meeting spiritual and social needs in various languages. Parishes provide pastoral care services to the travelling community, for youth ministry ranging from pre school to young adulthood and chaplaincy to refugees and seafarers, particularly in our parishes situated in ports.

This financial year has provided some interesting opportunities and challenges, covering 6 months of mission based activity across a pre COVID environment



10 million
hours of community service

(* Due to COVID restrictions)



and 6 months of COVID based mission. During this time, 88% of parish communities of the Diocese have provided foodbank services to the wider community. 65% have provided direct support groups for the elderly and 44% have developed direct action groups to work with the homeless and refugees, whilst 60% of parishes provide direct support for children in poverty. 76% of all parishioners have volunteered on projects supporting the local community.

Fr Tom Kleinschmidt from St Boniface in Southampton reflected on the simple ways that his parish has used this year of isolation due to COVID to encourage 'personal encounter'. "When we first went into lockdown back in March" explained Father Tom, "it was very difficult to adjust, but what we started to do was to contact every single person in our address list. It was a beautiful initiative" he continued, "we had a team of parishioners calling everyone, and because they were self-isolating they were so happy to receive word from the parish and know that we were praying for them and likewise, that we were counting on their prayers." Many other parishes have reached out to parishioners and vulnerable groups across the wider community in similar ways, offering accompaniment

via zoom or by telephone and providing opportunities for connection. In Eastleigh they have been running youth activities online, enabling families to get together via the web and providing a forum for women to share their experiences, joys and challenges.

James Lewis, a seminarian from Allen Hall reflects that for him, "one of the most memorable moments during Covid has to be the Novena to the Holy Spirit led by Canon Michael Dennehy at English Martyrs, Reading."

He goes on to say, "for 9 days at 6:30 am, parishioners and their friends, from the UK and from further afield came together on zoom to pray. One hundred parishioners took turns to lead the singing and the prayers. On the final day, Bishop Philip joined us with over 250 people in attendance. An experience I will never forget!"



We have Zoom groups for children, youth, families, parishioners, elderly..
Fr Raffaele – St Swithun Wells





“ I am amazed to see all the new ways in which the Church (that’s me and you!) steps up to its mission in the midst of the pandemic: in my personal prayer, in the home, as a family, in my marriage, in my parish, amongst my friends and in the people I see around me that are in need.

Miriam – St Boniface

“ We are engaging with the local council in providing support and information for the vulnerable. We are also working on a local project to provide deliveries of prescriptions, for which our church hall is a significant distribution hub

Fr Daniel – Hinksey

“ My parish is a community that is open-minded, welcoming and where hospitality and sharing are central.

RESPONDENT # 493*

*2021 Diocesan Faith Survey



87

parish communities

During Lockdown



55

parishes
live streaming Masses

15,075 average weekly Mass attendance



762,188+

hours of online liturgies,
support groups and formation



The power of parishes to bring communities together and help them thrive is evident. The impact of COVID-19 has made the social value of churches even more relevant. Church buildings are the 'key places' where we will start to rebuild our communities.

Looking to the future, the Diocese in collaboration with its clergy and laity will look to establish a development plan for each pastoral area based on the needs of the community, and encourage local Evangelisation Strategy Teams (EST) to develop action plans accordingly to ensure the maximum impact in line with our charitable objectives and the social good.

47
Pastoral Councils

21
Evangelisation
Strategy Groups

66
Welcome and
Hospitality Groups

885*
Other Core Groups



£11,648,827

Total Spending



* includes Bereavement, SVP, Healing, Catenian, Leadership, Justice and Peace, CAFOD,
Does not include all individual project led groups

Vocation

...fostering a culture of vocation

A key priority for the Diocese is to focus on the area of vocation, but what does this mean? Catholic teaching shows us that each and every individual is created in the image and likeness of God and that each of us is unique. The word vocation comes from the Latin 'Vocare' - to call. Through Baptism we are called to be saints. This is the universal vocation to holiness. Each of us is then called to a particular state of life - married life, single life, priesthood or religious life. Each person lives out this vocation through the day to day activities of life, through work, service, friendships and in family. Our vocation is nourished through the life of the Church, and in particular by receiving the sacraments and developing a prayerful relationship with Jesus Christ. A key responsibility of the Diocese and our charitable objectives is to support people to live out their calling from God, their vocation.

The Diocese provides this support in many different ways - access to the Mass, sacraments, formation, education, parish life and the opportunities for



outward looking service and mission. Parishes also use a variety of initiatives and programmes to help parishioners to foster their talents, providing training, support and development opportunities.

The Called and Gifted programme is one way in which the Diocese meets its objectives. The Called and Gifted Discernment Process has the specific goal of enabling Catholics within parishes to discern the presence of charisms in their lives. The process could be viewed as the Bishop's project to call forth, develop and invest in the giftedness of his people. Parishioners then put into practice the talents at their disposal impacting a multitude of service areas across parish life, serving in administration, sacramental preparation, social action, teaching and leadership roles. Since its roll out across parish communities the team have supported 2,013 individuals through the process, delivering 46 day long group workshops, 1,595 individually tailored interviews and developed 1,595 individual pathways for programme attendees.

The pre Discipleship team provides one to one accompaniment that focuses on the spiritual journey that all Catholics go through before they become disciples. Based on the work of Sherry Weddell, who identifies preliminary stages in one's faith journey, of "trust, curiosity and openness", before reaching "discipleship", the team looks at ways to engage people of these initial stages, in a formation of faith with a view to empower people to go out and make a difference within the parish and wider communities. The team has provided group training on how to accompany people on their faith journey. They have provided retreat days, an annual conference and have delivered inset training days to school leaders. In addition, a team of 70 intercessors provides prayer support for 1,500 unique prayer requests over the course of the year.



410

People experienced
Ananais Accompaniment
or Retreats



2013

successful participants



100+

courses and workshops

The pre Discipleship team also supports parishes to deliver the Alpha programme. Alpha is a parish tool for evangelisation based on hospitality, rooted in open conversation. The same Alpha content is run all over the world, by Christians of all traditions, sharing the good news of the life, death and resurrection of Jesus. The basic tenet is that everyone is welcome. Running for several weeks at a time, 20 to 30 guests meet to share a meal, watch an informative film about an aspect of Christianity and then gather into small groups for discussion and fellowship. Since inception, over 100 Alpha courses have been delivered across parishes and online - that equates to supporting 3000 new enquirers. The online delivery of Alpha has continued during the COVID Pandemic.

The Marriage and Family Life Team continues to deliver a preparation programme for those couples who wish to get married; covering spiritual, theological and practical content, with formed and trained catechists. The team provides support to couples who wish to learn about natural fertility awareness. Throughout the COVID pandemic many marriages and relationships have unfortunately suffered. 'Breakthrough' is a project that is offered to couples through a series of workshops, combining psychology and Catholic teaching, aimed at overcoming 'gridlock' in communication within marriage.

The Vocations Promotion team has been extremely busy over the past year. Fr John Cooke and Clare Ryan have sought to form relationships with young discerners to help guide them to the clarity and beauty of the Lord's invitation and giving them the confidence to embrace it. Pre COVID this was facilitated via monthly 'Seeker Nights' and individual appointments. This has been particularly tricky in these COVID times, but they have worked creatively around this, reaching

out using social media, via email and phone calls. They have also been able to go on 'socially distanced' walks with enquirers, where possible.

In tandem with this work, we have also had the joy of hosting the pre seminary year in the Sacred Heart House' where young men discern if they are being called to the priesthood. This has been a very intense period of hosting, prayer, formation and teaching - helping to cultivate the understanding of the Lord's call in the lives of the men entrusted to our care. This dovetailed with our hosting of the Seminarians in the first lockdown, who were sent home early from their year in Shrewsbury. Working with these men has been the highlight of our COVID year. Although priestly vocation is our primary task, we also work with young women too and have had one pursue her vocation to a religious community this year, and have directed another to discern consecrated virginity.



Alpha

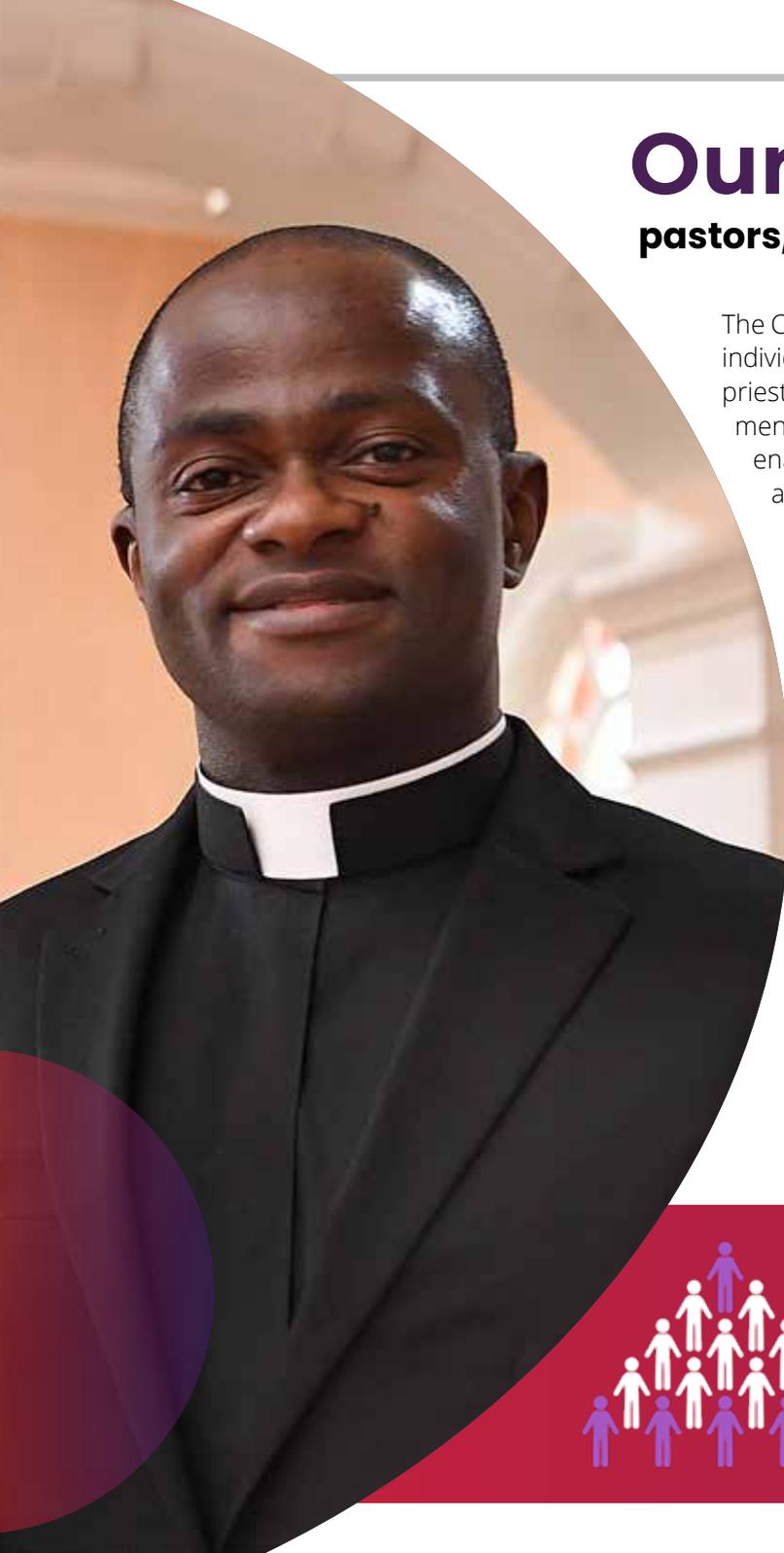
For me, this is what the life of the church should be about. It's given me a wonderful opportunity to deepen my relationship with Jesus and to get to know people I hadn't met before. It's given me more confidence to share the joy of my faith with others inside and outside the church.

Called and Gifted

We have witnessed family conversions to the faith, including our youth; callings to priesthood and diaconate, the changing of unjust cultures in the workplace, people bringing God's healing to others, new ways of making the faith alive and relevant for our youth, to name just a few

Marriage

Lockdown restrictions drew me into a more intentional communion, rediscovering His presence in the Word, in my relationships, in the present moment. I have a renewed thankfulness for the Sacraments; they truly are a gift.



Our priests

pastors, shepherds, leaders

The Catholic Church is made up of the Body of Christ, each individual person living out their vocation, and led by our priests; who are pastors, shepherds and leaders. These men guide our communities and offer us inspiration. To enable our parishes to be impactful, purposeful, active and beacons of the Holy Spirit, our priests need to be truly men of God. They need to be men of prayer, knowledge, wisdom and experience. They must display a range of skills and abilities, enabling them to adapt from one situation to another in order to carry out their pastoral ministry. With this responsibility comes professional responsibilities too, the need to run a large estate, with health and safety requirements; the need to manage a financial budget; the need to line manage staff.

“Upon this rock I build my Church”. The life of a priest is one of sacrifice and service because it is the life of Christ. “In persona Christi Capitis” the priest administers the sacraments; like Christ, he is the shepherd who guides and cares for the flock entrusted to him; as a mediator between God and humanity, he is called to sanctify God’s people, bringing them ever closer to Him.

A challenge that the Diocese has is to provide priests with the best training and support so that they can fulfill their roles as joyful, healthy and holy priests.

The Department for Clergy

The work of the Department for Clergy is based on two Vatican documents providing detailed guidance about the initial and ongoing formation of priests. (Pastores Dabo Vobis and Ratio Fundamentalis). In both, ongoing formation is seen as essential for priests at all stages of life and ministry, with a continuum between seminary work and ongoing formation as diocesan priests. Different approaches are taken with those recently ordained compared to priests in their middle age and retired priests, but all are expected to take responsibility for their ongoing formation in the four dimensions of formation; human, spiritual, intellectual and pastoral. It is essential that each member of the clergy accepts personal responsibility for all four aspects of ongoing formation. The Department for Clergy exists to enable or support this personal responsibility.

The Department for Clergy is led by the Head of Department and Vicar General Canon Paul Townsend who has been involved in ongoing formation for thirty years. The Diocese has 67 active ministry diocesan priests, 51 retired and another 31 from religious orders, the Ordinariate or from



67

Active Diocesan Priests



31

priests from overseas and religious orders

overseas dioceses including 6 from our sister diocese Bamenda. 9 parishes are served by religious orders with five having a very long history in the Diocese. (Where religious orders live in community whilst running a parish they have been counted as one priest in the statistics).

Canon Paul has a small team of one employed part time (3 days a week) and several volunteer human development professionals from various backgrounds including psychology, behaviour change, work with older persons, and adult learning. The team is blessed with personnel who have vast experience in administration, pastoral care, the management of change and conflict, collaboration and the care of people with behavioural or psychological issues. Our work with a small number of priests with significant challenges is regularly reviewed in case conferences, work which is supported by St. Luke's Institute in Manchester.

The team provides seven distinct services and supports other teams in the diocesan framework. These can be seen in the bullet points on the next page.

In addition, the diocesan pastoral supervisors scheme is provided with administrative and logistical support and there are collaborative relationships with the Safeguarding team and the Curia teams.

In 2019/20 a total of 23 active ministry priests were receiving regular support from the team including 1 priest recently ordained and 3 in years two, three and four post ordination, and 3 recently appointed as parish priests. They have been supported through monthly or 6 weekly visits (or during lockdown zoom meetings) to them and their parish priests.

The summer moves period is a busy time for the team and this year most of those parish priests who were moving, took up the offer of short focused support during transition. In addition those assistant priests who moved have received support. This ranges from practical assistance, the administrative challenges of changing address and health support structures, emotional well-being during transition (including working on the topics of stress, loss and disorientation), facilitating new working relationships, and the pacing of change.

The annual clergy training programme provides ten days of seminars and a 3 day residential conference. Subjects cover those four domains of formation and last year included topics on pastoral challenges, scripture, developments in marriage preparation, hospital chaplaincy, medical ethics, school liaison and the mandatory safeguarding training as well as days of prayer and the biennial diocesan clergy retreat at Douai Abbey. This year's training programme had to convert to online learning during lockdowns.

The work of the Department for Clergy is supported by the Department for Support and Administration Services. Priests are regularly supported across various business areas including finance, estates management and development, communication, human resources, safeguarding, fundraising and general administration.



23

priests receiving regular support in active ministry





It is a privilege to see how the priesthood is so crucial to the lives of some people. There is immense 'joy' of being with people at important stages of life, especially baptism, marriage, 'conversion', and death. Being able to 'make a difference' to others when they are in most need.

Fr Vincent

I begin each morning by miraculously changing bread and wine into the Body and Blood of Jesus Christ and distributing Holy Communion to the regular devout parishioners who attend daily Mass. I have met and continue to meet regularly with some of the most beautiful, genuine and selfless people anyone would be blessed to meet.

Fr Chris

It's about wanting to bring Jesus to others and to bring others to Jesus, wanting to save souls, wanting to bring as many people as possible to that true and eternal happiness which is only in heaven which we can even taste and have a glimpse of on this earth.

Fra Rosario

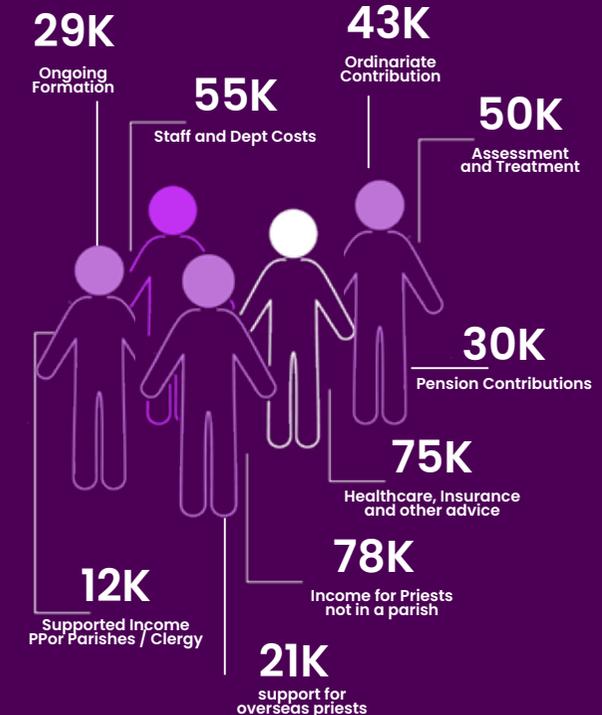
The Seven Distinct Services of the Clergy Support Team

- 01 Annual clergy training programme
- 02 Individual support to priests who are recently ordained (up to four years post ordination) and their parish priests
- 03 Individual support to priests on their first appointment as parish priests
- 04 Individual tailored support to priests who are facing significant and or complex challenges
- 05 Individual support and group induction for priests in transition between parishes or new to the diocese from overseas (including language assessments and tuition)
- 06 Individual support and practical assistance to priests in transition to retirement
- 07 Retreats and Prayer - A week's retreat for all clergy every two years at Douai Abbey. Days of Prayer during Lent and Advent



£425K

Department for Clergy Costs 2019/2020



Highlights of the Year

- Support to new parish priests
- Support to newly ordained
- Confidential services to priests covering personal issues and challenges
- General Contact during lockdown
- Provision of Ongoing Formation via ZOOM
- Clergy number predictions for Trustees

12 men training for priesthood

7 men discerning priesthood

2 diaconate ordinations 2020

1 priesthood ordination 2020

1 diaconate ordination for 2021

2 priesthood ordinations for 2021



7 Years
£210,000

**external
training costs
per man**

Building the Future

Preparing Men for the Sacred Priesthood

Part of our diocesan strategy is to ensure that the mission of our Diocese continues long into the future, and that the many ways in which the Church impacts on our local community and on so many individual lives continues to grow. To do this we need to find, train and prepare men who will become the priests of the future; future pastors, shepherds and leaders.

The Vocations Promotion Team has been instrumental in sowing important seeds in the hearts of many individuals and work with parishes and schools to raise awareness of the need and importance of the priesthood. Parishes and schools have also been successful in creating a culture of vocation, the environment for vocations to the priesthood to flourish. Any enquirers who want to learn more about the ministry of the priesthood and wish to discern whether or not they are called to service as a priest are put into direct contact with the Vocations Director, Canon Gerard Flynn who accompanies each man personally along, what can be a long journey, sharing his time, energy and expertise.

In his privileged role as Vocations Director, Canon Gerard has noted that "formation is different for every man, every year, and, in fact, every day." In his role, he is keenly aware that for each man, "the Holy Spirit works with him as the principal agent of his formation and that "the seminary and the Diocese have a great responsibility in supporting that work."

It can often take a number of months or even years before a young man is ready to apply

for seminary formation for the Diocese. Once accepted, via the selection process, each young man joins a seminary community that suits the personality, temperament and aptitude of the candidate. The Diocese currently has seminarians training in five seminaries - Oscott College in Sutton Coldfield; Allen Hall, Chelsea; Wonersh, Surrey; Venerable English College, Rome and at the Beda College, in Rome. Students who need some time to transition and prepare for seminary life also spend a year in pre seminary at Valladolid in Spain or at a house of formation in Shrewsbury. This year due to COVID, the transition year, called a 'Propaedeutic' year, has been provided by Fr John Cooke, the diocesan vocations promoter, within the parish of Fareham.

Seminary Life

The seminary community is composed of a community of students sponsored by dioceses from across the United Kingdom who devote themselves to personal formation for priestly ministry under the attentive guidance, supervision and evaluation of a formation faculty of priests and religious.



In this house of formation, seminarians deepen their awareness of the meaning and challenges of priesthood through their theological studies, through prayerful reflection on the revealed Word of God and the Tradition of the Church and its meaning for the modern world, as well as through a variety of pastoral service opportunities and human development. Usually, the seminary journey lasts for up to seven years before a man is ordained as a priest.

Seminary formation is demanding because it is ultimately where a man is formed mind, body, and soul into the image of Jesus Christ. Seminaries are not places where men walk around in silence all day chanting in Latin. Rather, they are places of joy, camaraderie, and deep learning! Today's seminarians experience the best formation the Church offers! The best formation and preparation comes at a cost. It costs £210,000 to train each seminarian for the duration of his formation. The majority of this expense takes the form of seminary fees.

Our success in recruiting new priests means that the Diocese of Portsmouth currently has 12 men in

seminary formation with a total cost of £2.73 million. As the current cohort of priests age, the demand for more young men to come forward and dedicate their lives to the mission and service of the Church will only increase and therefore so will the need to resource their formation financially. It is estimated that the Diocese will need to invest millions of pounds on seminarian formation over the next ten year period to meet the current diocesan needs for delivering its pastoral objectives.

Canon Gerard is looking to the future with hope and optimism for the challenge ahead and also recognises that "the work ahead is made easier by the prayers of so many kind people throughout the Diocese who pray daily for the chaps." One wonderful example, he explains is Vivien Ungoed-Davies, of St Colman's, Cosham, "who worked for eleven years, until very recently, in the Parish Vocations Group praying for and writing generous letters to them all. Such kind and heartfelt efforts are really appreciated by the men on their formation paths."

Canon Gerard has now had the joy of doing this work long enough to have rejoiced at a good number of



ordinations to the Sacred Priesthood of men that he has personally accompanied for six, seven or more years. He asks that "everyone joins him in praying for them all and most especially this year for Rev Deacons Anthony Fyk and Paul Nwune who will, please God, be ordained to the Sacred Priesthood at 11 am on Saturday 31st July at St John's Cathedral and for James Lewis who will be ordained to the Diaconate at the same Mass."

Rev Anthony Fyk, venerable English College, Rome

We usually think of a seminary as a place of academic studies. However, it is more than that. It is a crucial time of preparation for ministry in the Diocese to serve the needs of the faithful. It is time spent with Our Lord in prayer, study, work and fraternity. Underpinning this

is the four pillars of formation of spirituality, academics, human formation, and pastoral work. All four of these pillars are integrated in our day-to-day life and timetable at Seminary. These opportunities shape and form us to become more like Christ, the Good Shepherd.

Whatever situation we unexpectedly found ourselves in this past year, the formation process has continued, whether in the seminary or the Diocese. This has been a blessing. Formation and the spiritual life has not been 'locked down' but has continued to take place through different manners and forms. Spending more time in the Diocese during the first 'lockdown', was a blessed opportunity to learn more of the history of the Diocese, priestly life, and pastoral realities. To witness the faith and support of parishioners has been a highlight.



£345,817
Total Spending 2019/20



It is wonderful to be a seminarian and to study in the seminary. It is where you find men endowed by God with different gifts and talents. It is not only a place of academic pursuit, but also a place for fun, joy, and happiness. The social and spiritual life of the seminary community is amazing, and you meet people from different backgrounds who have left everything to follow Christ and to give their lives for the service of others.

This year, during COVID the weekly online seminarian 'get together' for prayer has been amazing. The seminarians came together to pray as one family, with love and joy of seeing each other, building friendship, and checking on each other. It would not have been possible without the wonderful support of Canon Gerard Flynn our vocation director and Bishop Philip Egan. I admire them for organising this, and for moving our seminarians into parishes to support the parish priests during lockdown across the different parishes of our Diocese.



Rev Paul Nwune, Transitional Deacon and seminarian at Wonersh



Who's Who?

King, Nathan
South Africa
Sacred Heart House
Discerner



Bateman, David
Portsmouth
St. Mary's, Oscott
Year Four



Farvin, Gonsalves
Reading
St. Mary's, Oscott
Year One



Fyk, Anthony Rev
Canada
VEC, Rome
Year Six



Hawkes, Ryan
Basingstoke
VEC, Rome
Year One



Nwune, Paul Rev
Nigeria
Wonersh, Surrey
Year Six



Lewis, James
Christchurch
Allen Hall
Year Five



Ezeani, Francis
Nigeria
Sacred Heart House
Propaedeutic Year



Chou, Ambrose
Portsmouth
St. Mary's, Oscott
Year Three



Browne, Ryan
Southbourne
VEC, Rome
Year Two



Hauschild, Edward
Southampton
VEC, Rome
Year Four



Ryan, Jack
Park Gate
VEC, Rome
Year One



Hiney, Tom
Army Chaplaincy
Beda, Rome
Year One



Edward Hauschild

Venerable English College, Rome



I am a "home grown" seminarian: I was born in Poole, Baptised at St Michael and All Angels Leigh Park (before the Church burned down: make of that what you will) and grew up in Chandlers Ford (attending Mass and serving as an Altar boy at St Edward the Confessor's Church). When not studying in Rome, I live in Southampton and serve Mass at St Edmund's and Holy Family churches. Last summer I received the ministry of Acolyte from Bishop Philip, and will (God willing) be admitted to Candidacy for Holy Orders this coming July.

I am so grateful to the diocese for giving me the opportunity to study in Rome. There is something special about preparing for priesthood at the very heart of the Church, so close to the successor of St Peter, alongside lay people, clergy, and religious from every corner of the universal Church. In my lecture hall, before COVID closed the University (twice) I sit between Jesuits from Kenya and Burma, seminarians from the United States, Augustinian friars from Brazil, and lay students from all over Italy. Studying together (and praying together) we're constantly reminded of this beautiful community to which we belong: a Universal Church which is called to proclaim the Gospel of Jesus Christ to every corner of the world for the salvation of souls!

It's inspiring too, to be able to walk in the footsteps of the holy martyr-priests who went before us. My own college boasts forty-four martyrs for the Catholic faith; ten raised to the altars as Saints and twenty-seven Beati. The missionary zeal, devotion to Christ and his Church, love for the people of England, and total detachment from the things of the world stand as models and examples for all of us in formation. It is my sincere hope, when I am (God willing) ordained as a priest, to bring back to England that same fire of faith with which the Martyrs burned so brightly, following the example of Our Blessed Lord, who says in chapter 12 of St Luke's Gospel "I am come to cast fire on the earth."



4

Diocesan Properties rented by PRF



17

PRF Owned Properties

Serving the Retired

Supporting our priests after a life of service

Our priests give their lives in service to the people of the Diocese, to the people of God and beyond the parish borders. Under obedience to the Bishop they are sent to where the need is the greatest. They often move frequently, leaving behind friends and colleagues and the projects they have helped to build.

Priests can retire from the age of 75, but often many carry on in ministry beyond this point, and even when they finally do step away from full time parish life, a life where they are available 24/7, many of them still support the Diocese as they can, hearing confessions, supplying for priests who need a holiday and providing chaplaincy to hospitals, schools and prisons.

We are very thankful to our priests and for their sacrifice. This is why we are proud of the support service that the Diocese has in place to care for our priests in retirement - Our way of saying thank you to them and showing them that we can give something back to them in return for all they have given to the many people across the communities of our Diocese.

The care that the diocese provides for its retired clergy is the envy of many other dioceses and is widely regarded as a gold standard.

Priests Retirement Fund

Canon David Hopgood oversees the welfare of retired priests using the services of the Department for Clergy and the stewardship of the PRF capital fund provided by Mr Alan Sendall.

51 priests are in retirement with another 8 due to retire in the next four years. 12 of those 51 live outside the Diocese, most having returned to be nearby family. 8 of the retired priests are in residential care and another 4 in semi-independent retired clergy flats near Basingstoke, in Windsor, in Guernsey and in Leeds.

If a priest decides to stay within the diocese post retirement and needs financial assistance the PRF will invest in an appropriate property that facilitates independent living for



51

priests in retirement



the priest in a place of their choice. That choice is often problematic for priests as they have spent their entire ministry following the requests of the Bishop to move parishes, and at 75, making their first decisions about where to live can be difficult.

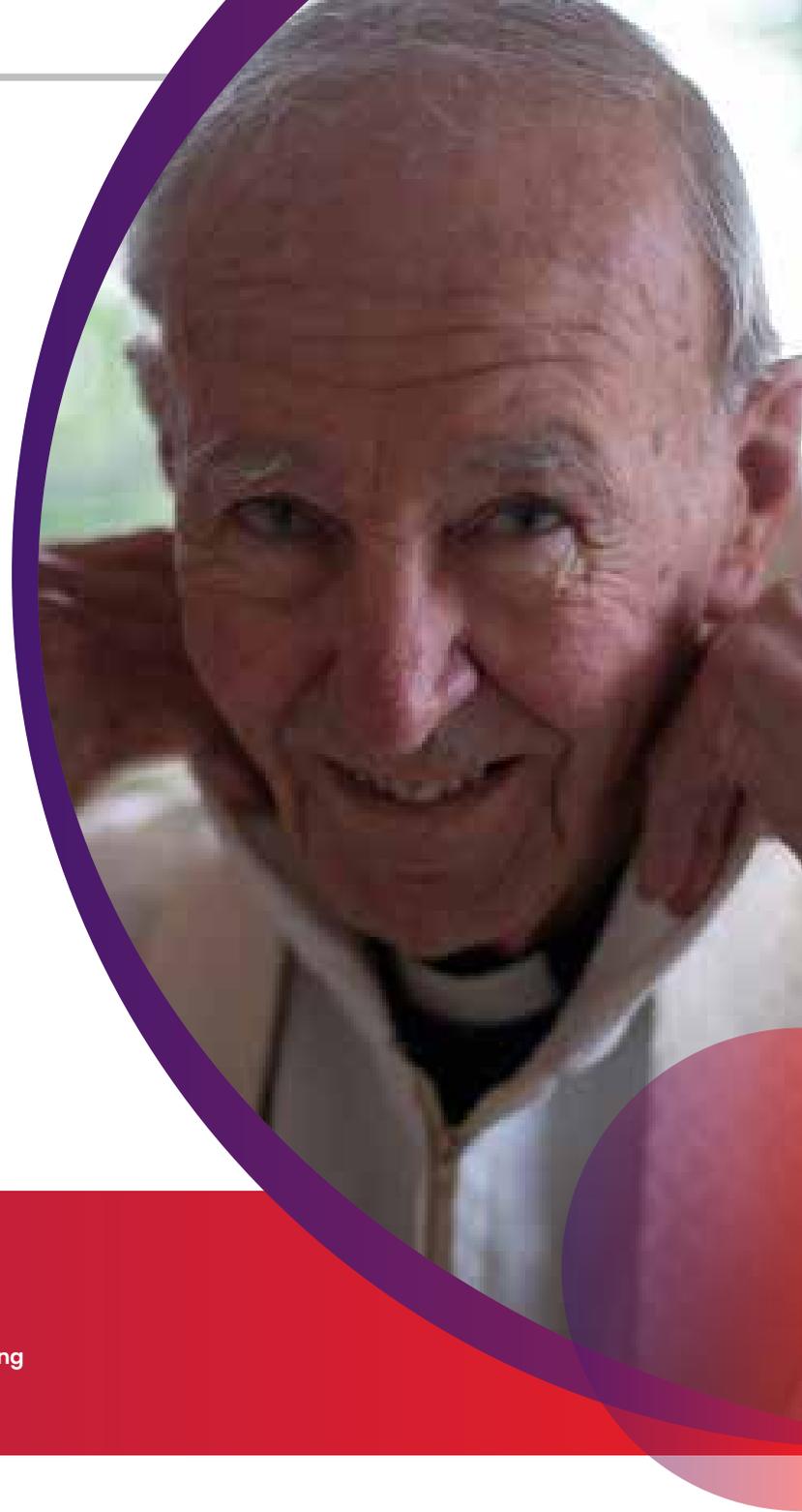
The Department for Clergy make contact with the priest usually a year or more before retirement and work with them on the limits to their choice in terms of budget and also future health needs as well as thinking through which parish to be in, near which church and with whom as personal networks of support. Nearer the retirement date practical and emotional needs are discussed and worked with, ranging from cooking and domestic skills, setting up phone, broadband and TV contracts for the first time, to role changes, loneliness and isolation, celebrating Mass less often, being useful, health issues and all the familiar issues to do with ageing. Assistance with understanding their finances and assistance with pension credit applications and other government paperwork is provided by Mr Alan Sendall, the PRF treasurer.

Fellowship with all diocesan priests continues through visiting, participation in clergy training and retreats, and the provision of holiday and other

supply cover for parish priests. Our retired clergy really do keep the show on the road in terms of filling in the gaps for Sunday Masses. It is good that the active clergy of the Pastoral Areas include the retired in their social gatherings, meetings and joint liturgies.

All through the year retired priests are supported we hope particularly within the parish where they reside, but also by amazingly generous parishioners from previous parishes. In addition they are regularly visited by a member of the Department for Clergy who is often the person who first spots that more support may be needed as the priest becomes frail or isolated. Then placements in either residential care or nursing care or in our semi-independent flats become options along with the complex assessment process for local authority funding for those placements.

Forecasts show that to maintain the level of support offered to priests in their retirement with the predicted numbers over the next ten years, the Priests Retirement Fund will need to source a further £3 million. The Diocese is committed to the service it provides for its retired clergy and is working with the PRF to achieve this target.



18

priests who have their own accommodation



£114,930

Total Retirement Spending

12

Care Homes and Semi independent intermediary care homes



**Prison
Chaplaincy
is one of the most
humbling
and
rewarding
experiences
of my 62 years
as a priest.**

**You meet people
where they
really are!**



Canon Peter Wilkie

Ordained in 1953 Lives in Winchester

Canon Peter, ordained in 1953 in Kingston-on-Thames, is the oldest ordained priest of the Diocese. He has had various roles over the years, including administrator to the Bishop, prison chaplain for twenty years, hospital chaplain and parish priest. He retired in 2005 and lived for many years in Milford on Sea. Since 2015, he has resided in a cottage in Winchester by the parish of St Peter's.

When I came to Winchester, Father Paul asked me if I would like to work, and I said I would be delighted to help, so I used to hear all the confessions on a Saturday morning and I said Mass at Stockbridge on a Sunday until about 6 weeks ago, when I had a fall in my bedroom and broke six ribs, had a pierced lung and spent a week in hospital and am still a little handicapped for walking.

The support I've received has been absolutely marvellous. Father Paul has such a concern and care for the clergy, it is quite wonderful. I've got Sue, Mary-Ann and Artur who are absolutely lovely. As soon as I became invalided, they helped me with my shopping and the place seems to be packed day after day with visitors.

The cottage I live in is a beautiful bungalow with one big room downstairs, a lovely kitchen and two bedrooms upstairs. It has a little courtyard outside the back which is wonderful. I can sit out in the sunshine and grow tomatoes!

I'm terribly happy in my retirement, I love people coming in to talk, and just class myself as very fortunate. We really have the most marvellous retired clergy care. I get regular enquiries to check that everything is OK and if I need anything or want anything. I get invitations to do various things. They care for my shopping. If I need transport, I only have to phone Artur and he comes immediately; if you feed him biscuits, he will do anything for you!

The whole team couldn't be nicer. The support is fantastic.



The support I have received in retirement has been excellent. I am always busy and feel very well supported. I am very happy and contented.





Education

Empowering young people in the image of Christ

Young people are not the Church of the future, they are the Church of now! The life of Jesus Christ as a young person, is one that Pope Francis invites us to consider in his exhortation, “Christus Vivit,” his official follow up text to the Synod on Young People, the Faith and Vocational Discernment that took place in 2018. In this long letter to young people, the pope urges them “to contemplate the young Jesus as presented in the Gospels, for he was truly one of you, and shares many of the features of your young hearts” (No. 31)

By seeing Christ in young adults, the Church is called to acknowledge that young Catholics are not simply the “Church of tomorrow,” as many will often say, but they are the Church of the present. Citing his address at World Youth Day in Panama, Francis describes young people as the “now of God” (No. 178). This is something that was also brought up in the final statement of the synod, which emphasises that “Young Catholics are not merely on the receiving end of pastoral activity: they are living members of the one ecclesial body, baptised persons in whom the Spirit of the Lord is alive and active. They help to enrich what the Church is and not only what she does. They are her present and not only her future” (No. 54).

A recognition that Christ is already active in young members of the church calls for a rethinking of youth ministry and a move to more participatory models where young people can become, as the Second Vatican Council called for, “the first apostles to the young” (Apostolicam Actuositatem, No. 12). For Francis, this means moving away from models where young people are passive recipients and a priest, religious or lay minister is the only agent. Instead of top-down approaches, Francis calls for a model based more on synodality, collective discernment and accompaniment.

Young people as ‘The Living Church’

Young people are visible in the Church. They are involved in parish life, school and university communities and the wider community, witnessing to their relationship with Jesus Christ through the sacraments, fighting for social justice, involved with social action projects and reaching out to those most in need, and witnessing to each other through their faith and discernment of the times as they find their way in the world. Young adults are visible in key roles across the Diocese and volunteer through many of the groups that are present.

The Diocese supports young people to respond to the invitation of faith in various ways. It provides the parish as the foundation for receiving the sacraments, participating in Mass and for personal growth through formation and catechesis. The Diocese provides education through its school network and provides chaplaincy across the region’s universities. There are also various opportunities for young people to experience the faith outside of the Diocese at events or through initiatives or via youth ministry opportunities.

Catholic Academies and Schools

Our Catholic schools, and our Catholic academies, alongside Catholic schools nationally are now a major component of the education system in England and Wales. As society has changed so too our Catholic schools have changed to meet the contemporary needs of children and young people. Consequently, our Catholic schools have grown in quality and public esteem.

In Pope Benedict's talk to children from our Catholic schools in 2010 he reminded them that "A good school provides a rounded education for the whole person. And a good Catholic school, over and above this, should help all its students to become saints". Our Catholic schools work alongside the family to not only ensure that all pupils reach their potential academically, but that during their time at the school they grow in their relationship with and love of God. Inspired to become the best model of the person God created them to be, they are challenged to respond to the call to transform by their words and actions the world in which they live.

The 71 Catholic schools and academies within the Diocese of Portsmouth:

- assist in the Church's mission of making Christ known to all people;
- assist parents, who are the primary educators of their children, in the education and religious formation of their children;
- are at the service of the local Church - the Diocese, the parish and the Christian home;
- Look outward in service to all

The Catholic schools serve a total of 31,639 pupils and their families through a network of over 2,000 trained and experienced leaders in education, supported by over 800 volunteer governors and Directors who ensure

outstanding governance in the performance of their duties.

The Catholic Academies and Schools Office (CASO) ensures on behalf of the Bishop that all the Catholic schools of our Diocese (independent, maintained voluntary aided and maintained academies) operate as 'Catholic schools' in accordance with both canon and civil law.

The Department seeks to develop our schools as key diocesan tools of evangelisation in union with the local parishes, pastoral areas and deaneries. The Department promotes excellence in Catholic education, providing direction and consultation in all diocesan schools and their governing bodies, especially in religious education, collective worship and religious education resources, all of which are at the heart of the curriculum and purpose of a Catholic school.

The Bishop, Vicar for Education, Director of Education and the Chief Operating Officer are now developing the education strategy for the next ten year period to safeguard Catholic education for the next generation and to ensure that the mission and impact of Catholic education continues to thrive.



71

Catholic Schools



31,639
Pupils



88% good or better (Ofsted 8 inspections)

100% good or better (Section 48 8 inspections)

62% outstanding RE and Catholic Life (Section 48)



£141 million

invested by the Government
into our provision of
Catholic education



£384,946

Total CASO Spending



£8.8 million

spent on developing school buildings

Catholic Academies and Schools Office (CASO)

The Diocese invests substantially in the provision of Catholic education. This investment is in addition to the funding that is provided by the government in recognition of the service and commitment from the Diocese in providing this service to the wider local communities.

The CASO office employs 4 staff that provide a service to schools. Schools contribute to the cost of these services. Services include:

Policy Governance

Through termly briefings for Headteachers, partnership briefings for Foundation Governors, and monthly newsletters, CASO updates schools on changes to education policy and facilitates the sharing of good practice between schools.

Formation

CASO provides training for new headteachers, foundation governors, teachers new to the diocese, newly qualified teachers, RE Leaders, heads of RE, teachers of RE, seminarians and priests. It also provides tailor made support on specific issues, e.g. delivery of the RE curriculum, the appointing of headteachers and senior leaders, pastoral issues, or support following disappointing results or an OFSTED outcome.

Interconnection

CASO liaises across 12 local authority areas, including education representatives from local authorities, the Department for Education and the Catholic Education Services.

Collaboration

Headteachers and governors serve on our education steering and stewardship groups which help to discern the priorities for our work and how we can further support each other by working in partnership.

In addition to this CASO undertake Section 48 inspections of our diocesan Catholic Schools, inspecting the provision for religious education and the quality of Catholic life and ethos. This year, 8 inspections have taken place. In addition, a series of external Ofsted inspections have also taken place.

Due to the impact of COVID over the last year many of the usual services have had to be reshaped to meet the immediate needs of schools.

In addition, 56 primary teachers from across the Diocese gathered over two days to develop their understanding of the RE curriculum and liturgy in school, including creative ideas to engage their pupils.

An Annual day for Headteachers, Deputy Headteachers, Governors and Chaplains took place aimed at providing support, challenge, dialogue and formation for senior leaders. The theme this year was virtues.

Families from across the Diocese enjoyed the weekly prayer service, games and activities provided by CASO during lockdown, which helped them to understand better the Sunday readings.

What have our schools been up to?

From September 2019 to March 2020 it was business as usual, and then COVID hit! Our schools have had to maintain a provision of 'in person learning' for the majority of the COVID lockdown. This has had to be carried out with the additional pressure of delivering education in line with social distancing guidelines and providing online learning and learning packs when necessary, for families in isolation and when 'in person' provision was not allowed. The provision for children of key worker groups has been in place consistently in person. Schools have been busy not only delivering a high quality curriculum across the school phases but ensuring that the wider community engagement and social action has also taken place, providing a great deal of solace and encouragement to a great deal of vulnerable and isolated groups.

Charitable Outreach

Students across the Diocese have been involved in a variety of charitable activities including fundraising events for CAFOD, MISSIO, SVP and homeless charities, foodbank collections, winter packs for the homeless, art work for hospital chapels, visiting and writing to the elderly in care homes, supporting families during lockdown and making PPE for local hospitals.

We are working with the parish to support some of the families in the school community who are in need in different ways. Children have created hearts and sent messages to the local residents to create links between the elderly and the children. Our school, our own families, and some of St Mary's parish raised a whopping £3,737 to feed every child, every day for a year in a school in Liberia. This year we have raised £2,300 so far for the same school. St Amand's primary, Wantage



Spirituality

There have been countless missions of prayer in our schools during the last year, such as rosary clubs, lunchtime prayer clubs, retreat days, lectio divina, adoration and reconciliation services. During lockdown schools across the Diocese prayed together through the daily act of worship led by CASO or individual schools. Some cluster groups even managed to celebrate a virtual leavers Mass together.



We have delivered over 6,000 hours of live learning covering the majority of subjects. An 'extra ordinary' normal curriculum. Staff have also provided 1:1 live and 'face to face' counselling and contacted key families each week. St Edmund's Secondary, Portsmouth



700+

Sustained Projects

£158,089

raised for
external good causes



The staff have managed to completely furnish a home for a family recently rehoused in the area, including a fridge, beds, bedding, tables and clothes. Through the support of local charities and the coordination of our Home-School Link worker, Rosie Miller, we have provided hampers and presents for many different families in our school community. We continue to source additional food hampers. Children have written letters to the residents of a local care home in order to open up an ongoing correspondence between the children and the elderly. Canon Gerard from St Michael & All Angels, Leigh Park, has filmed videos for some of our RE lessons. *St Thomas More primary, Bedhampton*

We have been very aware what families have available to them at home to support remote education. On top of the delivery of food parcels and pastoral support to those families that need it, our amazing staff spent a week creating over 280 "St Anne's in a box" care packages which were then delivered to eligible St Anne's families across the city by staff volunteering in their spare time. Packages contained a "home office" kit with stationary, parenting support, as well as some extra food and hygiene products. *St Anne's Secondary Girls, Southampton*

The new Mini Vinnies were commissioned at the end of our Harvest Mass and are now taking an active role. They led the recent Samaritan's Purse Shoebox Appeal, packed and sent off 60 filled shoe boxes as Christmas gifts for less fortunate children around the world. They also helped at one of the regular Parish lunches for the elderly engaging with the seniors and wholeheartedly serving, helping and chatting with them. A credit to themselves, their families and their school. We were certainly very proud of them'. *St Edmund's primary, Abingdon*

Our 'Courageous Advocacy' project developed from our annual Inter-House Public Speaking competition where pupils engaged with many difficult and varied topics affecting society, all of which demonstrates our young people's commitment, skill and passion in arguing for better care of our planet and each other.

St Edward's Royal Free Ecumenical middle, Windsor

We celebrated our special Founder's Day with Mass, led by Father John, in song, worship and prayer to rejoice and give thanks for the school's rich history. In the spirit of our founding order we have challenged all our pupils to 125 acts of kindness to celebrate our 125 anniversary. Running from Advent until Easter pupils will share the thing they do to support each other, the local community and the wider world.

St Joseph's College, Reading





As part of our work in the community, our children collected items for 'Winter Survival Packs' suggested by our local homeless charity-Brett Foundation. Staff then distributed them one evening in December.

The pupils raised £350 for a very special local charity, Thames Valley Hospice in addition to donating food this harvest to Foodshare.

Each of our six Y4-Y6 classes visit a care home (they sing, take a gift and chat) or sing for the elderly in the church during Advent. Our Y6 children also visit a care home weekly (3 children each week) to take part in activities with the residents.

Our site controller Adrian has been off since before Christmas recovering from Covid. He was in hospital for a number of weeks and we were all very concerned. We have over one hundred children in our critical worker and vulnerable children provision as well as our nursery children attending the site during lockdown. Adrian would usually open the car doors for parents at a turning circle drop off point (so parents can distance) and welcome the children in. In his absence, Fr Liam Cummins -our wonderful Parish Priest- has been providing this service each day for our CW and vulnerable children before saying morning Mass. A wonderful example of ministering to the wider parish.

St Edmund Campion, Maidenhead



Chaplaincy: Universities and Youth Ministry

The Department for Educational Chaplaincies invests in coordinating the ecclesial mission of school and university chaplains, networking them into unified missionary teams. Led by its director, Episcopal Vicar for Education Canon PJ Smith, the department focuses on ensuring the practice of mutual support, the sharing of information, liaising with the Diocese on behalf of chaplains and youth workers, identifying existing challenges and proposing appropriate responses, as well as developing norms of good practice.

The university chaplains team comprises all Catholic Chaplains, lay and ordained, paid or voluntary working within universities. The Department for Educational Chaplaincies coordinates the team's approach. There are 6 university chaplaincies - Bournemouth, Portsmouth, Reading, Southampton Solent, Southampton and Winchester.

A team of FOCUS missionaries has been serving the students and chaplaincy at the University of Southampton since September 2017. The team, all from the USA are led by Kaitlin Gilday. The role of the missionaries on campus is to invite university students into a growing relationship with Jesus Christ and His Church, to inspire and equip them for a life-time of Christ-centred

evangelisation, discipleship, and friendship in which they can lead others to do the same.

Currently, there are 10 weekly Bible studies consisting of a total of 47 students, both men and women. The missionaries have invited 12 students to commit to living more intentionally as missionary disciples of Christ. These men and women are in close mentorship with one of the missionaries. They have committed to daily prayer, frequenting the sacraments, striving to live virtuously and inviting more people in relationship with Christ through leading a Bible study themselves and discipling others.

Since the FOCUS missionaries have arrived in Southampton, several students have started attending daily Mass, either on campus or in a nearby parish. Also, several students have developed a more personal relationship with God and learned how to pray with Scripture through lectio divina. The missionaries are in contact with nearly 200 students at the university and are continuing to invest in those relationships with the hope of more souls coming to know Christ.

During lockdown, much of the team's work is continuing online through 'Zoom' meetings, and the team have opened up their provision to young people online from outside the university and to other areas of the Diocese.



20
Teams



6
universities



£280,881
one to one accompaniment

Sr Valentina Stilo is full-time chaplain. "In normal times, we used to joke and say that really I just needed a bed in the chaplaincy" smiles Sr Valentina, reflecting on her work these past nine years at Southampton University, "because my whole life was spent there".

"My work has always been a combination of two levels" she explains, "I am chaplain to the Catholic students and work very closely with the Catholic Society and FOCUS. I am also chaplain to the whole university, the students, members of staff, to believers and non-believers alike".

"Now with Covid, we have been trying to be creative by doing events online" she continues, "but I think personal contact is still very important, so I spend my days on the phone and I go out for walks with one student at a time."

"We are busier than ever, because people need a lot of support at this time" Valentina reflects. "We have seen a great increase in the levels of anxiety and depression among the students and even among the members of staff, with financial insecurity, isolation and fear."

Despite the difficult year, Sr Valentina is hopeful for her students. "My hopes for our young people right now, is that they can really live the experience of the resurrection of Jesus" she says, "and that our little community has been able to help prepare the soil during Lent for them to have this experience, that they can believe that the life of the resurrected Jesus is one rooted in the community of hope and the beauty of the Eucharist, the beauty of drinking from the scriptures,



the beauty of being able to be Christians and testify to God's love in these difficult times; that this is the resurrection, this is Jesus alive within us and this is our strength and our hope".

"I have learned that you never stop learning. Young people have a lot to teach us about the beauty of God, even the one you never thought could tell you anything about God. I have learned that God speaks through them. I am so grateful for this time working with them and to see Jesus working through them".

In addition to providing a chaplaincy network to schools and universities, the diocese provides opportunities for young adults of all ages to participate in special events and youth centred initiatives like FLAME, Youth 2000, Lourdes pilgrimage and World Youth Day. The Vicariate for Education looks forward to being able to provide these opportunities as we progress Post COVID.

Parish Youth Groups

Some of our parishes provide structured programmes for youth ministry to support young people of all ages to develop and grow in their faith and talents. In the St Swithun Wells parish, they provide a three tiered programme.

It starts with the Stars of Abraham which is an initiative for all children in school year 3 to 6. There are three

groups in the Parish, which meet regularly every week during school terms to play games, sing songs, and share our lives together. Stars of Abraham offers children a beautiful opportunity to take their faith seriously and learn to recognise God's presence in every moment of their lives.

Grail Seekers is a group for all young people in school year 7 to 9. "We build on the work already done and share our lives together in the light of a 'weekly

input', published every week on our Youtube channel. Occasionally we also organise day trips".

Finally, Student Youth is a group for all young people in school year 10 to sixth form. "When we meet we start having dinner together, then we listen to presentations given by one of us, watch a film or listen to a talk given by a special guest or share our lives together in the light of a 'topic'".



Evangelisation

Developing a joyful, missionary Church

Evangelisation is key to the mission of the Church and all that we do as a Diocese. The Church has a great deal of people who know how to transform parish life into all that it can and should be in the 21st Century. They express their faith and act with radical zeal in the mission of sharing the Gospel.

In order to evangelise, people need to personally encounter Christ and personally encounter other people in our community. When we share the Good News through our actions and our words, it invokes an invitation from the Holy Spirit in the person we meet to respond in some way, so that the Holy Spirit can work in the heart of the individual.

When our parishes become more outward-looking, service and mission-oriented, centres of authentic encounter, then they begin to grow as more people want to get on board and start coming to our Church. Key to this is personal invitation. That is why the Diocese invests into the formation and catechesis of its clergy and laity, because it is not easy to reach out in the right way, knowing how to share the

Gospel message through word or deed. A deep faith and engagement with the Mass and through the Sacraments is also essential. This is why we provide so many local Mass centres and regular provision of the Mass and the distribution of the Sacraments.

It is also easier to invite someone in to a community that is safe and joyful. This is why the Church fosters a culture of safeguarding and inclusion, and by the nature of the happiness and joy that is in each of us can provide a joyful environment to which others can be attracted. This is why so many of our parishes establish 'Welcome' teams. It is important that there also things going on in and around the parish to which friends, family and all can be invited. It is through these opportunities that people can respond. Our parishes across the Diocese provide many opportunities for people to experience the joy of the Gospel.

Alpha, is a process that many of our parishes run to enable people with no connection to the Church to respond and experience encounter. Alpha is an 11-week course that creates a space, online or in person, where people are excited to bring their friends for a conversation about faith, life and God. Alpha is a series of sessions exploring the Christian faith. Each talk looks at a different question around faith and is designed to create conversation. Alpha



72

Monthly Clergy Meetings



84

Monthly SLT Meetings



takes place in our parishes, in our churches, universities, and parishioners' homes. No two Alpha's look the same, but generally they have three key things in common: hospitality, a talk and good conversation.

In 2019, over 5,600 Catholic parishes and organisations around the world ran Alpha with an estimated 310,000 participants. For much of 2020, the programme has had to move online.

To equip and ensure that our parishes meet the challenges of the New Evangelisation, many of them are embarking on a process of parish renewal. The Vicariate for Evangelisation offers support throughout this process for parishes in various ways. This process of renewal is unique to each parish, however many of the attributes that need to be developed are common, for example, the development of a parish vision, the establishment of a leadership group to support the priest etc. To work their way through this process of change, some of our parishes have implemented the Divine Renovation process, others use a similar process.

By investing in the Divine Renovation process, parishes are provided with insight and reflection on topics surrounding developing missional practices. Parishes are supplied with action oriented and inspiring content designed to support parish renewal. A series of experienced coaches work with parish and diocesan leaders to help parishes move forward through the process of change. The creation of a tailored approach for each parish helps us respond to local context's and individual parish needs through the development of parish resource kits.

There are currently 5 parishes who are fully invested in the Divine Renovation Process with plans for others to come on board, despite the impact of the COVID

pandemic and the government restrictions being in place throughout 2020. The Evangelisation team aim to support an additional 5 parishes each year to build on the initial successes.

Parishes such as City Centre, Southampton are part of the Divine Renovation group. St Swithun Wells, Eastleigh is engaged in developing its own process for moving from 'Maintenance to Mission and St Joseph and St Margaret in Bracknell' are starting to be part of the Divine Renovation mutual support group.

In English Martyrs, Reading, through the senior leadership team in the parish, specific programmes are co-ordinated and projects are tailored to the needs of the local community – all aimed at expanding the Church's reach and appeal. A member of the Parish Leadership Team at English Martyrs, said: "We have been looking at parish renewal for around 2 years. As a team we meet once a week and after a prayer and gospel reading we discuss strategy."

"We look to focus on the issues that are relevant to this parish, the needs of the people in it and the resources that we have available." she said. "One of the first things we did was to agree a vision for our parish: 'English Martyrs is a welcoming community, inviting, encouraging and supporting all to have an ever-deepening relationship with Jesus. We are inspired to show God's love to the world with joy and hope.' This guides all aspects of our renewal and provides the soil from which the seed of a mission focused parish can grow."



312

Weekly 1:1 Meetings with parish priests





22

Diocesan led CARITAS projects



*6129+

Parish Social Action Projects



£104,927

Project Spending

Outward Looking Service

Our parish communities grow and evangelise best when they look beyond their borders and reach out to people in the local community. Our clergy and parishioners 'take Christ' into the midst of society. The Vicariate for Evangelisation supports this outward looking service from parishes in several ways, led by the provision of support services through the department for Charity and through the department for Evangelisation.

CARITAS and Parish Social Action

Many of our parishioners report that people often experience an encounter with Christ in moments of need or weakness, when they are particularly in need of support. CARITAS is the social action agency of the Diocese.

Cardinal Tagle, who is the President of CARITAS International recognises that "CARITAS shines a ray of hope in places where people face harsh realities, injustices and suffering. CARITAS remains a steady symbol of the care of the Church for the poorest whom we serve."

CARITAS Portsmouth helps our parishioners and network of volunteers to put 'Faith into Action'. CARITAS projects rebuild communities, bring hope in times of crisis, provide grassroots power against homelessness, hunger, poverty, injustice, isolation and support our parishes to go to those where the need is greatest.

Whilst much of the work of CARITAS has had to adapt due to the COVID Pandemic, it hasn't stopped our volunteers from reaching out

across the 87 local communities that the Diocese serve.

The support and direction that our CARITAS network has provided over the financial year has led to not only CARITAS organised projects developing, but 'CARITAS inspired' projects developing, independently at parish level by parish volunteers and coordinators, collaborating with other local charitable organisations, groups and faiths.

For example, the Gosport Open Doors project, supported by over 300 volunteers, initially sought to get the homeless off the streets during the hardest months of Winter in the Gosport and surrounding areas. The project was coordinated by CARITAS in collaboration with St Mary's Catholic Parish, Gosport and 5 other church centres. The project worked alongside Gosport Borough Council and other organisations to get rough sleepers back on their feet.

As well as a place for the town's homeless to stay, and provide a healthy hot dinner and breakfast, it will offer a chance to rebuild trust through volunteers' friendship and support.

The project supported between 20-25 rough sleepers per day and has been a huge success.



Similar projects have run in Portsmouth and Windsor.

The Gosport Open Doors Centre now signposts individuals to specially designed pods and provides safe intervention through support and networking. The centre now provides a weekly art therapy group and a peer led support group, as well as providing emergency food provisions and new clothes and toiletries to 94 homeless individuals.

Similarly, the Diocese was able to secure a grant of £69,271 from the Albert Gubay Foundation to support the provision of parish foodbank and food service projects running across many of our parishes during the year. Our foodbank projects across just 8 parishes, in Portsmouth, Gosport, Newbury, Southampton, Bournemouth, Basingstoke, Bracknell Forest and Winchester have helped more than 1,200 families per week throughout the last year.

In Basingstoke and Portsmouth, they went a step further and developed the 'Insight Project'. These projects built a community for people who felt marginalised in society, for individuals struggling with mental health issues, recovering from addictions and people without

homes; - "there was no qualifying criterion" Sue Cregan explained, who is the project coordinator in Portsmouth, "everyone was welcome".

"It was just a place for people to meet, to build a community and then to share a hot meal. InSight really is 'living our faith'. Our aim was to build friendships through respect and tolerance, with an emphasis on warmth, support and safety" she continued. "It was a shelter from the outside world for a lot of our guests".

"We also supported them while society locked down, providing telephone support to many of our guests at critical moments in their lives. "We don't offer counselling" Sue continued, "but rather friendship and a listening ear".

The InSight team also decided to carry on providing a hot meal, which had been such an integral part of their service, although this time, it would be take-away rather than sit-down.

Through schools, they also provide food parcels for families affected by lockdown. One headteacher told Sue that a parent had come up to her in the playground



to say thank you for the food parcels" Sue recalled, "that her child had been sleeping in his PE kit for the past week and that receiving the food parcel had given her some extra cash to go and buy him some new pyjamas.

Summing up their efforts at InSight, Sue reflects: "I remember the Encyclical letter Fratelli Tutti that Pope Francis brought out last year, where he said we should be neighbours rather than associates, and this is exactly what we are trying to be to our guests".



CARITAS Refugee Community Sponsorship

The Community Sponsorship Scheme welcomes and resettles refugees, putting local communities at the heart of a family's journey to a new life in the UK. The community assumes responsibility for a refugee family, from first arrival through to settled independence as part of their local community.

CARITAS Portsmouth has been working with the government to initiate 6 local projects across the diocese. The two-year programme comprises three main elements: Housing – Funding – Support.

Local teams find and prepare a suitable,

affordable family home, raise a support fund to cover additional needs, and plan and deliver a programme of resettlement support.

After security screening, medical checks and initial preparation for life in the UK, sponsored families arrive with full refugee status, which gives them the right to work, school places, free healthcare, English tuition (ESOL) and state benefits.





Working with our partners

We partner with countless external groups and agencies to deliver our mission and meet our objectives. Parishes work with other faith communities, charities, local authorities, companies and funders across the local community. The department for Evangelisation supports this grassroots work by providing specialist teams who engage in important areas of dialogue on behalf of the Church.

Through the Sectors for Dialogue team, the Christian Unity Team and through the Inter Faith Team the diocese is able to engage with other Christian communities, other faith communities, politicians and local governments and provides a platform to cultivate good relations, foster dialogue, and engage in critical conversation across various cultural sectors including education, politics, science, economics, medicine etc.

In addition to the specialist teams, the Formation for Mission Team, particularly helps to prepare parishioners to reach out and engage more knowingly and passionately in the mission of bringing people closer to Jesus Christ through His Church.

The team provide regular formation for parish catechists and parish readers, and more generally to offer faith formation for all adult Catholics in the Diocese of Portsmouth.

Formation for Mission

They do this by offering training opportunities, short and longer term courses, accompaniment and mentoring.

This year, the team have had to adapt and refocus their work because of the pandemic, having to forego many of the usual diocesan events and parish courses, providing online content instead.

“One of the greatest challenges this year has been to adapt the two workshops for parish readers to an online format,” said Sr Hyacinth, team leader. “These workshops involved reading practice in small groups, which is an essential part of the training.” The team had to find a way to offer this reading practice online, and so have formed a team of 27 volunteers, the ‘Diocesan Listeners’, from different parishes across the diocese, all experienced readers and passionate about the Word of God. “They volunteer their time to offer 1:1 practice to the readers who sign up for the training.”

Using this model of online workshops and individual practice, the team have offered so far three sets of training online and have now trained altogether 360 parish readers, to mark the Year of the Word in our Diocese.

Another exciting development is the launch of our ‘We are Acceptional’ group of volunteers, all part of our team, who are dedicated to offering help and support to parents and catechesis for the catechesis and sacramental preparation of children with additional needs.



£104,926
Total Spending



I have been blown away by the content. It has restored how I view each day and how every day is a gift. Plenty of references to read through and ponder.

Web Participant – Diocesan Faith Survey, 2020



Highlights of the Formation for Mission Team's Year



Enlightening and extremely good presentation of meanings for readings and gospel - we're so very grateful.

Webinar Participant

Wonderfully deep and rich study of the Bible - the Gospel reading for each Sunday. You will be truly blessed.

Webinar Participant

I thoroughly enjoyed the workshop and it gave a much needed lift to my faith in these very difficult times. So good to connect with people and to feel hope that we will return to Church, celebrate the Eucharist together and read once more.

Workshop Participant

A well-crafted and illuminating experience that left the attendees felling well-equipped and affirmed in this ministry.

Reader's Course Participant

It has encouraged me to delve more deeply and to pray, before preparing to read at Mass.

Reader's Course Participant

Thank you for all your support during lockdown and enabling us to obtain needed funding which has helped us a great deal.

Mgr Vincent

Many thanks for all your help which has resulted in this positive outcome. Thank you also for all the advice in completing the forms, access to the grant portal and your recommendations.

Mary, Pastoral Assistant

Thank you so much for this very creative initiative. I am so grateful to you for thinking this problem through and providing such a brilliant solution.

Parish Administrator

Thank you very much for the lovely and excellent assistance with our fund raising. We absolutely appreciate your efforts

Parish Administrator



£203,000

Largest Single Grant
Annunciation Parish, Bournemouth
October 2020



£1.7million
April 20–April 21

Fundraising for the future

Time, Talents and Treasure

Since the 2020 Year End...

The Diocese of Portsmouth as a charity is heavily dependent on charitable giving as a source of recurrent income in order to support its charitable objectives set out in accordance with the diocesan ten year strategy. It is responsible for generating the funding for all of its ongoing costs from its own activities.

Following an intensive period of organisational development over the last period, the diocese has determined that it is currently in a strong position to develop its fundraising activities.

The key aims of the Fundraising Strategy are: to increase and diversify the Diocese's income, in order to improve its financial sustainability; and to put procedures in place for effective long-term fundraising management to meet the needs of the Bishop's vision for the whole Diocese.

The diocese is signed up to the fundraising regulator and its code of conduct and has a fundraising policy in place with appropriate processes and controls to manage fundraising. There have been no complaints during the financial year regarding fundraising activity.

In April 2020, the Diocese formed a fundraising team. The team consists of a grants officer, who is responsible for supporting parishes with securing grants for community based and capital projects and a development officer, who is responsible for supporting parishes to enhance their planned giving efforts through a stewardship programme.

Since April 2020, the Diocese has been able to secure £1,195,244 in grant awards from funding partners. This has been secured from submitting 88 applications on behalf of 38 parishes. A total of 51 applications have been successful to date with a further 18 applications pending an award. There has been a total of 22 community project grants awarded and a total of 29 grants awarded for capital building and development projects. All projects have benefited parishes.

The team has also been working hard to support parishes during the COVID pandemic, helping parishes to mitigate the financial effects of lockdown and loss of revenue due to the closure of churches and halls. The team has provided regular resourcing and messaging for parishes, alongside new systems for online giving and cashless giving, in addition to creating new templates for increasing giving by standing order and direct debit.

During the COVID lockdown when churches were closed, the team were able to set up online giving pages for each parish. The pages have raised a total of £482,015 excluding gift aid so far since April 2020 and up to April 2021.

The team has also been working hard to develop a stewardship programme to support parishes once they return to a post COVID normality. This will help parishes to raise the funds needed to support their local vision and mission.



£1,195,244
Successful Applications

£482,015
Received from Online Giving Pages

88
Grant Applications

78%
Application Success Rate



£203,000

**Heritage Grant
October 2020**

Since the 2020 Year End, Various grants have been secured...

Bournemouth Annunciation Parish

In Bournemouth, a £203,000 Heritage England grant has allowed the Parish of The Annunciation to carry out urgently required masonry repairs to Sir Giles Gilbert Scott's first church. The important geometrical stone windows, stone buttressed bellcote and banded stone required urgent restoration where some of the window masonry was so dilapidated that it was in danger of collapse. A separate £25,000 grant allowed for the repair and replacement of leaking rainwater goods. (October 2020)

Various Parishes

Our Lady Queen of Apostles in Bishops Waltham and St Boniface Southampton have recently suffered sheet metal thefts and were two of our 30 churches who each obtained the maximum £2500 grant from the Allchurches Trust roof protection scheme, via a bulk Diocesan grant application enabling roof alarms and SmartWater to be installed to reduce the risk of future loss and damage.

Reading English Martyrs Parish

English Martyrs parish have actively worked with the Diocesan fundraising team and have managed to secure a total of 4 separate grants covering the areas of capital repairs, digital and reopening and recovery. So far they have been awarded £63,000. (April 2020 - April 2021)

Ryde St Mary's Parish

St Mary's parish on the Isle of Wight received a £25,000 grant from Historic England for urgent repair works to the internal heritage aspects of the church. The parish are now working with the fundraising team to secure several other awards. (Jan 2021)

Various Parishes

During the first lockdown period the diocese was able to secure a total of £129,271 from the Albert Gubay Foundation to support the work of several parish foodbanks and food services projects. The money helped provide needed assistance to hundreds of families across the diocese who were struggling to feed their families. (June 2020)

Marriage and Family Life

Our Marriage and Family Life team received a grant of £8,720 from the National Lottery to provide support to married couples throughout the COVID pandemic. Many couples during lockdown have experienced a time of intense pressure on their relationship and needed support.



Financial Review

Prioritising our Resources

Overview

For the 12 months to the end of August 2020 the accounts of the Roman Catholic Diocese of Portsmouth showed a deficit on operating activities of £87K, this deficit represents 0.6% of total income. In the previous financial year the deficit had been £249K, 1.6%.

The net loss incurred by the diocese reduced compared to the prior year, but 2020 was a difficult year for the church financially. Many sources of income declined but these were offset by a small number of large exceptional items of income, these exceptional items have given the impression that income had remained materially constant.

The decline in income was experienced across many parishes. The exceptional, large items of income benefited only very few parishes. Most parishes have seen income reduce, many significantly.

Offsetting the decline in income, the costs of running the diocese has reduced as COVID-19 lead to enforced reduction in diocesan activities.

Public Benefit

The Trustees review the strategy and approve the priorities for the year, developed by the Chief Operating Officer and Senior Leadership Team. The priorities always reflect the objectives within the Bishop's vision. In undertaking this review the Trustees have referred to the guidance contained in the Charity Commission's general guidance on public benefit and have received training.

The Trustees ensure the diocese benefits the public by bringing meaning to people's lives, providing opportunities to strengthen relationships with God, providing a moral and ethical framework for life and through community and social cohesion in its pastoral work.

Income - Diocesan

The income received in the diocese was heavily impacted by COVID-19. The closure of churches and social distancing measures that were introduced reduced the number of people able to attend mass and reduced church activities. Total income declined from £15.3 million in 2019 to £14.2 million in 2020.

The largest source of income for the diocese remained Donations, Offertory and legacies which were 76% of total incoming funds to the diocese, £10.1 million.

Expenditure - Diocesan

Expenditure in 2020 reduced to £14.3 million from £15.5 million in 2019. Diocesan activities were reduced as a result of COVID-19, this reduction in activity lead to a reduction in total cost.

The cost of local activities within the parishes, the Local Mission, accounts for 81% of total diocesan expenditure, £11.6 million. Mission support accounts for 19% of total diocesan expenditure, £2.6 million.

Mission support is provided by the central Curia of the diocese. Mission support provides diocesan religious activities not provided in the parishes, an analysis of total costs of the diocese is shown in the table below, further detail of the costs incurred can be found in note three of the accounts.

Local Mission

2020 was a difficult year for the parishes of the Diocese. The COVID-19 pandemic interrupted parish life, led to the closure of churches and stopped mass for part of the year.

The annual accounts of individual parishes in 2020 showed 48 parishes making a deficit for the year, the total loss for the 48 parishes was £900K.

Income – Local Mission

75 parishes experienced a decrease in income in 2020 with the average decline across these 75 parishes being £20K. As a result of the COVID pandemic, loose plate offertory income declined by 27% compared to the prior year, whereas planned giving offertory income, including donations made by standing order and direct debit, reduced by only 4%. Parishes that received the majority of their offertory income by loose plate suffered the greatest hardship during COVID-19.

In addition to the decline in offertory income, parishes experienced reduced income from hall rental and centre income as a result of closures enforced by COVID-19. Hall rental and centre income declined by £355K in 2020/21.

Expenditure – Local Mission

There is a detailed breakdown of the cost of local mission in note three to the accounts. Most costs declined due to general reduction in activity.

The cost of Clergy declined because COVID-19 closures effected the parishes over Easter and reduced the Easter offering. In addition to this the cost of substitute priests reduced as activity reduced.

The cost of maintaining buildings did not decline, there were £2.1 million of repairs and maintenance costs and £800K of works that have been capitalised. The diocesan estate is insured for £440 million, if this is deemed to be the value of the diocesan land and buildings the repairs and maintenance costs are 0.7% the cost of the estate.

Support Costs

Back office support and governance functions such as IT, HR, Finance and Safeguarding are integral and necessary to enable a charity to operate. As such these costs have been allocated to charitable departments and an element of support costs are included in all charitable activities. Note three to the accounts provides a breakdown of support costs and shows how they have been allocated to each charitable activity.

Total support costs were £1.6 million, this is 11% of total diocesan costs. A breakdown of support costs are shown in the chart aside.

Mission Support

The largest cost within Mission Support is the cost of supporting catholic education. The cost of Catholic education is partly the cost of the Catholic Schools and Academies Office (£271K) and partly the cost of the diocese's obligation to maintain the fabric of catholic schools within the diocese (£328K). The cost of major capital projects in the schools are shared between the government and the diocese. The government typically contribute 90% the cost of maintaining the buildings and the diocese contributes 10%. Voluntary contributions from parents met £247K of this cost with the remaining £81K met out of diocesan funds.

The cost of Clergy support was £425K in the 2020 financial year. Clergy support provides priests with support and resources to help them in ministry, where possible help them stay in ministry and where necessary support priests that might need to step away and later return to ministry. Clergy support also includes the costs associated with ordinariate and overseas priests and some benefits that priests receive like pension contributions and some healthcare costs.

The cost of training new clergy was £346K in 2020. Training seminarians is a major cost to the diocese, seminary fees alone can be up to £38K a year for each man. The Diocese of Portsmouth was funding 13 men in seminary during 2020.

Total cost of training new clergy in 2020 was reduced as seminaries were closed for part of the year due to the COVID-19 pandemic.

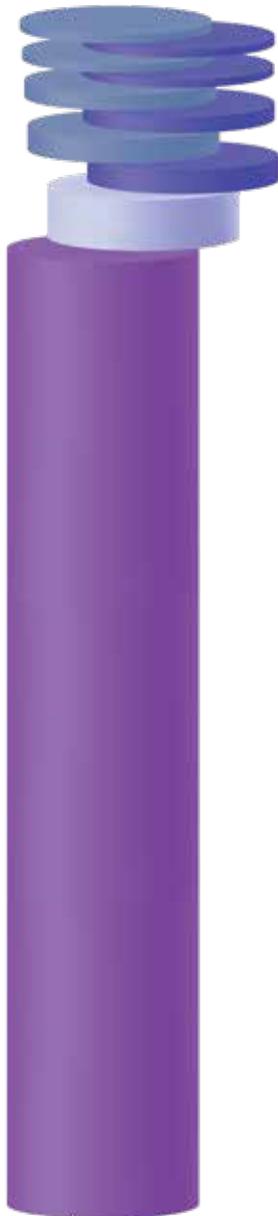


Support Services Costs Breakdown

Mission Support (Supporting Parish/Church)

Total Costs
£2,647,299

19%



Local Mission (Parish)

Total Costs
£11,648,827

81%

Supporting Catholic Education - 5%
£712,708

Clergy Support - 3%
£424,879

Training New Clergy - 2%
£345,817

Youth and University Chaplaincies - 2%
£280,881

Supporting the Poor and Marginalised - 1%
£203,203

Supporting Retired Priests - 1%
£114,930

New Evangelisation - 1%
£104,926

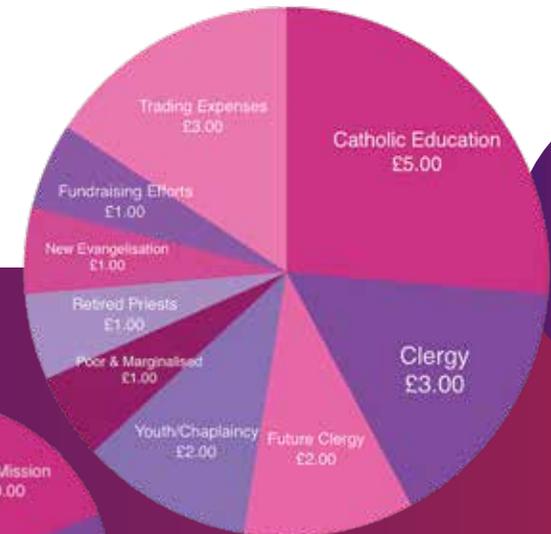
Expenses of trading subsidiaries - 3%
£376,108

Fundraising - 1%
£83,848

Where is the money spent?



If you give £100 per year,
where does it go?



= Total £100 per year



Reserves

A new reserves policy was approved in the financial year. The new reserves policy states that the diocese should hold general funds (unrestricted, non-parish funds) equal to six months of mission support costs. The target level of general funds was £730K.

Total reserve of the diocese were £68.5 million at the end of 2019/20 financial year. The value of the churches, halls, and presbyteries of the diocese account for 61% of total diocesan reserves, £42 million. These assets cannot be spent so they should not be considered as part of general funds. A new designated fund was established in the year to hold the value of operational fixed assets. After transferring the value of operational fixed assets into the designated fund, the general funds reduced to be in deficit by £3.9 million. This was £4.6 million below the target level of reserves.

To return general funds to a balanced position the diocese is investing into fund raising. To date the fundraising department have been successful in supporting parishes respond to COVID-19 by setting up online giving portals and Standing Orders and Direct Debits. Grants in excess of £1 million have been awarded to the diocese during the period from September 2020 to May 2021. £550,000 of the grant awards were to meet the cost of Capital works in the diocese.

To return the general fund to a balanced position the diocese is seeking to improve the income received from the diocesan estate. The key focus of the diocese is to identify opportunities for the estate to earn long-term income for parishes and the diocese.

The negative general reserves are not considered a

going concern risk as over £5 million of the liabilities contributing towards the deficit on free reserves consists of inter-company balances between the Curia and parishes and other funds.

Investments

The diocese holds £11.0 million invested in quoted investments. The target level of return set for these stocks and shares is CPI plus 4%.

The trustees of the diocese have agreed an ethical policy for the portfolio. The following is an extract from the investment policy.

Where the issuer of a security (share, stock or bond) or deposit taker (bank) is directly and substantially (more than 5% of activity of that entity) involved in activities which constitute grave moral evil such investments are to be entirely excluded on the grounds that holding such securities would constitute formal co-operation in that evil.

These would include but not be limited to, murder, procured abortion, contraception, sexual activity outside marriage, acts which undermine the dignity and sanctity of human beings (for example the exploitation of workers, migrants, the weak and the elderly) from conception to natural death, corrupting the young, heresy and sacrilege.

The Bishop and Trustees require that our investment managers keep under review the environmental stewardship of entities in which the diocese holds investments or deposits and instructs them to refer any activities which might constitute a breach of the duty of the stewardship of creation to them.

Risks

A detailed Risk Register is provided for the Trustees to review monthly. The register includes detailed operational risks. The key risks impacting the delivery of key objectives are set out as follows:

Financial Risks

The risk to Diocesan finance reflects the ability of the Diocese to meet ongoing obligations due, exacerbated by year on year reductions in practising Catholics, COVID-19 restrictions and the potential financial risk of further lockdown as well as recession and associated economic damage.

There are further risks due to dispersed decision making on financial expenditure, and robustness of financial reporting for non-central activities.

Mitigation includes the centralisation of all Curia budgets and controls on permitted upper spending limits.

A wider Diocesan strategy is being developed to mitigate risk in the longer term.

COVID-19 Impact

The ongoing COVID-19 related restrictions present the risk of longer-term impact on the practice of the faith. Restrictions on faith formation for adults and children, participation in the sacramental life of the church and connection to the faith community may mean further loss of practising Catholics and impairment to the mission of the Church.

Much has been done at parish level to try to mitigate the impact including electronic means of engagement, personal contact where possible, and online resources.

However not all parishes have been able to adapt which may affect the longer-term future for those communities.

Health and Safety

The risk of noncompliance with general health and safety regulations and Government directives remains a risk due to the variation in access to volunteer and paid support and levels of commitment in parishes.

Complaints about breaches are actively investigated and remedial actions undertaken.

A full suite of updated risk assessments has been developed for adoption by parishes as well as the central team including updates on COVID compliance.

The central office has implemented COVID-secure policies and is operating on a flexible basis to manage pressure on facilities. There are few staff working on site during the latest lockdown.

Policies are actively being updated so that parishes are clear about their obligations.

Clergy numbers

The ageing profile of clergy and small number of vocations remain a significant concern.

Active vocations promotion is in place and clergy support is provided in a structured way. There are religious orders and communities serving local populations.

The ongoing work of evangelisation and the active adoption of the Divine Renovation programme as well

as key initiatives such as Year of the Eucharist, which is currently in planning, are important to nurture new vocations.

GDPR

Compliance with GDPR remains a risk. There is a Data Protection Officer adviser and a Data Protection Manager in post. Near misses have been identified which indicate further training needs across the Diocese which will be progressed.

Two members of central team have completed DPO-level training run by the Catholic Insurance Service. The Interim IT manager is taking the lead working with the external DPO to deliver the agreed improvement plan for central services now.

Online training has been put in place and requires additional promotion across parishes.

IT breaches of security

All IT systems are at risk of breaches of security. A few staff and volunteers have been impacted by scams over the last year.

Additional security measures have been put in place by the IT manager and testing has been undertaken to ensure that awareness has been raised.

A specific risk regarding insurers covert testing of systems and the implications where responses indicate low awareness of IT security has been highlighted.

A report has been provided on IT activity to the Trustees including the outcome of the testing.

Volunteers

The oversight and support of volunteers remains a risk given the numbers involved across the diocese. Policies may be poorly understood and those acting on behalf of the Diocese may be unclear about their boundaries and responsibilities.

An administrative officer within the central department is supporting the head of People and Governance to develop volunteer resources and it is proposed that a formal joint role with Caritas is established

Estate

The Estates Department have developed a comprehensive operational risk register concerned with the care of listed buildings and general maintenance.

A full update of all policies and procedures has been completed to support parishes and visits are undertaken by the estate team to support parishes locally

Education and written communications are required to remind parishes of the particular care needed in undertaking any work to listed buildings.



Structure, Governance and Management

The objectives of the Charity include the following: - The provision, maintenance and upkeep of churches, public chapels and presbyteries belonging to or connected with the Roman Catholic Church in the Diocese. The provision, maintenance and carrying on of the religious services of the said Church in such churches and public chapels or other places of like character. The provision, maintenance and upkeep of houses of study, halls and colleges for the education and training of priests and persons desirous of becoming priests of the said Church in the Diocese or elsewhere. The provision, maintenance and upkeep of schools, academies and colleges for the general education both religious and secular or religious or secular of children and young persons, whether or not members of the said Church. Generally, for any such charitable purpose or purposes as in the opinion of the Bishop may be calculated to lead to the advancement or maintenance of the Roman Catholic religion.

The Charity was constituted by a Trust Deed dated 4 September 1934 registered under Charity Number 246871. On 11 September 1934 its Trustees were incorporated under the Charitable Trustees Incorporation Act 1872 in the name of Portsmouth Roman Catholic Diocesan Trustees Registered. Following an Order of the Charity Commission dated 14 August 2002, this Trust Deed was revoked and a new Trust Deed dated 5 August 2002, was put in place by the Bishop and the Trustees, followed by a Deed of Variation dated 7 April 2004. On 20 July 2001, there was a Direction from the Charity Commission that all the charities of which the Trustees are Trustees except the Portsmouth Roman Catholic Priests Retirement Fund (Charity Number 1061194) and the charities holding real property in the Channel Islands, should be treated as a single charity for the purposes of registration and accounting under the Charities Act 1993.

The Charity is governed by the Board of Trustees, which is responsible for the strategic governance of the Diocese. The Bishop acts as the Chairperson.

The Trustees meet on a regular basis to further the mission of the Church in the Diocese, including attending to the financial, property, legal and administrative affairs of the Diocese. In accordance with Canon Law, a Diocesan Finance Council has been established. It consists of the same persons as are Trustees and meets at the same time as the Trustees.

Full meetings of the Board took place on 5 occasions in 2019/2020. The Board is supported in decision making by detailed scrutiny and recommendations provided by the Board sub committees: Finance, Audit and Risk; HR and Remuneration; Vocation Vicariate; Education Vicariate and Evangelisation Vicariate; which meet regularly throughout each year.

As well as being Trustees, the Bishop, the Vicars General, the Episcopal Vicars for Vocation, Education and Evangelisation are responsible for adhering to Canon Law.

Of these, the Vicars General and the Episcopal Vicars, all of whom are Trustees, are also parish priests and are remunerated in the same way as all other priests of the Diocese in parish ministry, as is the Bishop. The remuneration of the Chief Operating Officer is fixed by reference to similar roles in other dioceses and comparable religious charities.

The Curia is organised into a Framework for Collaboration, with three vicariates, that for Vocation, leading to that for Education, leading to that for Evangelisation, reflecting the threefold ministry of the Bishop who acts in the name of Our Lord Jesus Christ as priest, prophet and king.

Each Vicariate is headed by an Episcopal Vicar, who, together with the Vicars General, are the sole members of the Bishop's Council, all of whom have been appointed Trustees. There are three Trustees' Vicariate committees, corresponding to the three vicariates, each being chaired by the Episcopal Vicar for that vicariate.

The Finance, Audit and Risk Committee ("FAR") was established in December 2018 as an additional trustees' committee. Its purpose is to provide strategic oversight to the administration of the temporal goods of the Diocese and its parishes: its land and buildings, money, investments and the discharge of its legal and contractual obligations.

The 'Living Our Faith' Committee, formerly the 'Living Our Faith' Impact Committee, operates according to the aims and objectives of the 'Living Our Faith' campaign between 2008 and 2012.

The Priests Retirement Fund Management Board continues, as the management board of a separate charity, the Portsmouth Roman Catholic Diocese Priests Retirement Fund.

The Safeguarding Commission, the Chancery and the Tribunal continue to operate independently of the Curia.

The structure of the Diocese presents a harmonious balance between the charity's legal responsibility and that of its responsibility to Canon Law. The Council of Priests meets regularly to consult on matters of Canon Law and advises Trustees.

Trustee Recruitment and Training

Trustee Recruitment

Trustee vacancies are advertised through the appropriate diocesan communication channels. In consultation with the Chairperson, it is decided if external recruitment is required. This is determined by identifying any shortfalls in current skills and experience of the Trustees incumbent.

All candidates applying for the position of Trustee will follow a selection process that includes the Bishop, Chairperson to Trustees. Prospective Trustees will be interviewed by a panel consisting of Trustees. The recommendations of the selection panel will be made to the full Board of Trustees and any successful applicants are co-opted on to the Board at the next full meeting and then ratified by the full Board.

Trustee Induction and Training

The Secretary to Trustees ensures that an appropriate Induction Training Programme is arranged and completed within three months of appointment.

The induction comprises formal induction training including: Clarification of legal responsibilities; Charity Commission requirements of Trustees; strategic issues; governance issues; familiarity with the Trust Deed; and all relevant induction material to allow Trustees to understand the Charity's purpose, financial position and current risks.

Management Team

The Trustees are responsible for the overall management of the diocese. To achieve this they have appointed a management team who are full time paid employees of the Charity and form the Department for Support and Administration Services (DSAS). The Chief Operating Officer leads the team to spearhead the Charity's implementation of its objectives in a tough and ever changing environment, working closely with the Bishop, Vicar General's and Episcopal Vicars. The DSAS leadership team comprises:

Heather Hauschild, Chief Operating Officer
Mark Van Wijk, Director of Finance and IT
Chris Smith, Director of Comms and Fundraising
Hilary Foley, Director of Estates
Catherine Hobbs, Director of Education
Karena Fulford, Head of People and Governance
Ruth Attfield, Safeguarding Co-ordinator

The Trustees have approved a detailed schedule of delegations to make it clear which decisions are reserved for the Board of Trustees and which can be made by Board sub groups, Councils or members of the DSAS Senior Leadership Team.

Setting Pay

The Diocese of Portsmouth has a dedicated HR and Remuneration sub committee, which considers remuneration across the diocese and makes

recommendations to the respective Boards. The sub committee meets regularly throughout the year. The Vicar for Clergy, through the Council of Priests also makes recommendations to the appropriate board in respect of clergy pay. This meeting takes place at least on an annual basis.

Remunerated roles within the Diocese of Portsmouth are regularly benchmarked against a number of different channels; other dioceses, other organisations across the charitable sector; and other business sectors, both locally and nationally.

Relationships with Organisations

Part of the Diocese's success can be attributed to its partnership with the many and varied external organisations it collaborates with such as the Catholic Trust for England and Wales (CATEW), the Bishop's Conference for England and Wales (CBCEW), other Catholic dioceses and the voluntary independent sector.

The diocese also works with many Catholic and Non Faith groups in carrying out its mission, such as the Catherine of Siena Institute, Divine Renovation, Alpha, Youth 2000, Celebrate, SVP, Catenians. It collaborates with local authorities, department for education, hospital and prison authorities to provide seamless services to benefit families and individuals across the geographical regions.

Statement of Trustees' Responsibilities

The purpose of this statement is to distinguish the Trustees' responsibilities for the accounts from those of the auditors as stated in their report. The Charities Act 2011 requires the Trustees to prepare for each financial period financial statements which give a true and fair view of the Charity's financial activities during the period and of its financial position at the period end. In preparing the financial statements the Trustees are required to:

- Select suitable accounting policies and 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 this basis applies.

The Trustees are responsible for ensuring proper accounting records are kept which disclose, with reasonable accuracy at any time, the financial position of the Charity and enable them to ensure that the financial statements comply with the Trust Deeds and the disclosure regulations. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of error, fraud and other irregularities.

'Approved by the Board of Trustees on 01 July 2021 and signed on their behalf by:

Rt. Rev Philip Egan (Trustee)

Rev Michael Dennehy (Trustee)



Independent auditors report to the Trustees of the Portsmouth Roman Catholic Diocesan Trust

Opinion

We have audited the financial statements of The Portsmouth Diocesan Trust for the year ended 31 August 2020 which comprise the consolidated Statement of Financial Activities, the consolidated Balance Sheet, the cash flow statement and 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, including 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 group's and of the parent charity's affairs as at 31 August 2020 and of the group'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.

Basis for opinion

We have been appointed as auditor under section 144 of the Charities Act 2011 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 group 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 51, 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 group's and the parent charity'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 group or the parent charity 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 group's or the parent charity'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 Trustees' Annual Report. 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 require us to report to you if, in our opinion:

- adequate accounting records have not been kept by the parent charity, or returns adequate for our audit have not been received from branches not visited by us; or
- sufficient accounting records have not been kept; or
- the parent charity 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 charity's trustees, as a body, in accordance with section 144 of the Charities Act 2011 and regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the charity'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 charity's trustees as a body for our audit work, for this report, or for the opinions we have formed.

Haysmacintyre LLP
Statutory Auditors
September 2020

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 Accounts

Consolidated Statement of Financial Activities

for the Year Ended 31 August 2020

	Notes	Unrestricted Local Mission	Unrestricted Mission Support	Restricted Funds	Total Funds 2020	Total Funds 2019
		£	£	£	£	£
Income from:						
Donations and legacies						
Donations and Offerories		8,466,576	24,063	1,597,788	10,088,427	10,026,348
Legacies		724,480	10,125	20,526	755,131	442,245
Charitable Activities	2	1,153,251	300,255	146,389	1,599,895	1,765,658
Income from trading subsidiaries	18	162,736	-	94,669	257,405	233,418
Investment income	3	691,214	80,614	87,341	859,169	888,066
Other income		433,255	110,902	-	544,157	558,089
Gain on disposal of fixed assets		-	105,061	-	105,061	1,375,088
Total Income		11,631,512	631,020	1,946,713	14,209,245	15,288,912
Expenditure on:						
Raising funds						
Expenses of trading subsidiaries		277,392	-	98,716	376,108	299,657
Fundraising		-	83,848	-	83,848	-
Charitable activities						
Support of Parish Life		10,653,780	-	995,047	11,648,827	12,659,528
Vocation						
Training New Clergy		-	37,571	308,246	345,817	463,848
Clergy Support		-	406,448	18,431	424,879	433,737
Supporting Retired Priests		-	114,930	-	114,930	97,496
Education						
Supporting Catholic Education		-	384,946	327,762	712,708	829,643
Youth and University Chaplaincies		-	280,881	-	280,881	362,937
Evangelisation						
Supporting the Poor and Marginalised - Inspired by the Love of Christ		-	47,166	156,037	203,203	274,348
New Evangelisation		-	104,927	-	104,927	116,253
Total expenditure	4	10,931,172	1,460,717	1,904,239	14,296,128	15,537,447

Consolidated Statement of Financial Activities continued

for the Year Ended 31 August 2020

	Notes	Unrestricted Local Mission	Unrestricted Mission Support	Restricted Funds	Total Funds 2020	Total Funds 2019
		£	£	£	£	£
Net (Outgoing)/Incoming Resources before transfers		700,340	(829,697)	42,474	(86,883)	(248,535)
Realised and Unrealised (Losses) on Investments		(987,450)	(4,078)	(69,685)	(1,061,213)	(563,738)
Net income/(expenditure)		(287,110)	(833,775)	(27,211)	(1,148,096)	(812,273)
Transfers between Funds						
Transfers - Curial Services		1,528,897	(1,528,897)	-	-	-
Transfers - Diocesan Levy		(2,152,976)	2,152,976	-	-	-
Net movement on funds		(911,189)	(209,696)	(27,211)	(1,148,096)	(812,273)
Reconciliation of funds						
Fund balances brought forward		63,342,454	2,391,617	3,882,860	69,616,931	70,429,204
Fund balances carried forward		62,431,265	2,181,921	3,855,649	68,468,835	69,616,931

The statement of financial activities includes all gains and losses in the period. All operations are continuing and there are no discontinued operations in either year. The comparative year's Statement of Financial Activities is included in note 21.



Consolidated Balance Sheet

as at
31 August 2020

	Notes	Local Mission £	Mission Support £	Total 2020 £	Total 2019 £
Fixed Assets					
Tangible assets	7	39,158,371	3,075,504	42,233,875	42,561,926
Investments	8	18,186,281	8,415,044	26,601,325	27,880,156
		57,344,652	11,490,548	68,835,200	70,442,082
Debtors: due after more than one year	9	-	135,643	135,643	222,187
Current Assets					
Debtors and prepayments	9	14,318	813,439	827,757	1,466,163
Cash at bank and in hand		2,569,405	2,776,485	5,345,890	1,600,932
		2,583,723	3,589,924	6,173,647	3,067,095
Creditors: due within one year	10	(420,157)	(5,358,785)	(5,778,942)	(3,859,580)
Net Current Assets/(Liabilities)		2,163,566	(1,768,861)	394,705	(792,485)
Creditors: due after more than one year	10	-	(896,713)	(896,713)	(254,853)
Parish Loan Accounts					
Due from parishes		(3,830,403)	3,830,403	-	-
Due to parishes		8,876,211	(8,876,211)	-	-
		5,045,808	(5,045,808)	-	-
NET ASSETS		64,554,026	3,914,809	68,468,835	69,616,931
Unrestricted Funds					
General Funds		-	(3,892,874)	(3,892,874)	(1,121,728)
Designated fund - Value of Diocesan Buildings		39,158,371	3,075,504	42,233,875	-
Designated Funds	13	23,272,894	2,999,292	26,272,186	66,855,799
		62,431,265	2,181,922	64,613,187	65,734,071
Restricted Funds	12	1,397,493	1,693,316	3,090,809	3,109,454
Permanent Endowment Funds	11	725,268	39,571	764,839	773,406
RESERVES		64,554,026	3,914,809	68,468,835	69,616,931

Charity Balance Sheet

as at
31 August 2020

	Local Mission	Mission Support	Total 2020	Total 2019
	£	£	£	£
Fixed Assets				
Tangible Fixed Assets	35,847,911	3,075,504	38,923,415	42,620,045
Investments	18,186,281	8,415,044	26,601,325	27,880,156
	54,034,192	11,490,548	65,524,740	70,500,201
Debtors: due after more than one year	-	135,643	135,643	222,187
Current Assets				
Debtors and prepayments	-	813,439	813,439	1,482,813
Cash at bank and in hand	2,408,261	2,776,485	5,184,746	1,693,556
	2,408,261	3,589,924	5,998,185	3,176,369
Creditors: due within one year	(207,428)	(5,392,689)	(5,566,213)	3,986,007
Net Current Assets/(Liabilities)	2,200,833	(1,802,765)	431,972	809,638
Creditors: due after more than one year	-	(896,713)	(896,713)	254,853
Parish Loan Accounts				
Due from parishes	(3,830,403)	3,830,403	-	-
Due to parishes	8,842,307	(8,842,307)	-	-
	5,011,904	(5,011,904)	-	-
NET ASSETS	61,246,929	3,914,809	65,168,738	69,657,897
Unrestricted Funds				
General Funds	-	(3,892,874)	(3,892,874)	1,121,728
Designated fund - Value of Diocesan Buildings	39,158,371	3,075,504	42,233,875	
Designated Funds	19,965,797	2,999,292	22,998,993	66,896,765
	59,124,168	2,181,922	61,306,090	65,775,037
Restricted Funds	1,397,493	1,693,316	3,090,809	3,109,454
Permanent Endowment Funds	725,268	39,571	764,839	773,406
RESERVES	61,246,929	3,914,809	65,161,738	69,657,897

Reconciliation of Net Incoming Resources to Cash Inflow from Operating Activities

for the Year Ended 31 August 2020

	Notes	2020	2019
		£	£
Changes in resources before revaluations		(86,883)	(248,535)
Returns on investment		(859,169)	(320,520)
Depreciation		958,714	881,448
(Gain)/Loss on disposal of Tangible Fixed Assets		(105,061)	(1,375,088)
Decrease/(Increase) in debtors		724,950	831,939
(Decrease)/Increase in creditors		2,561,222	560,246
		3,193,773	329,490
Net cash inflow from operating activities		3,193,773	329,490
Cash flows from investing activities			
Returns on investment		859,169	320,520
Payments to acquire tangible fixed assets		(806,188)	(1,880,609)
Receipts from sales of tangible fixed assets		280,586	1,375,088
Payments to acquire investments		(2,156,757)	(1,224,442)
Receipts from sales of investments		2,374,375	1,119,482
Change in cash and cash equivalents in the year		3,744,958	39,529
Cash and cash equivalents at the beginning of the year		1,600,932	1,561,403
Cash and cash equivalents at the end of the year		5,345,890	1,600,932

The notes form part of these accounts



Reconciliation of Net Cash Flow to movement in net debt

for the Year Ended 31 August 2020

			2020	2019	
			£	£	
Increase in cash in the year			3,744,958	39,529	
Cash inflow/(outflow) outflow from increase/(reduction) in debt			(1,614,993)	(560,246)	
Change in net debt resulting from cash flows			2,129,965	(520,717)	
Bank loan drawn down			(946,429)	-	
Movement in net debt for the year			1,183,536	(520,717)	
Net debt at 1 September 2019			(2,513,301)	(1,992,584)	
Net debt at 31 August 2020			(1,329,765)	(2,513,301)	
ANALYSIS OF NET DEBT		At 1 Sep 2019	Cash Flows	Other Changes	At 31 August 2020
Cash and bank balances		1,600,932	3,744,958		5,345,890
Creditors : Due within one year		(3,859,380)	(1,837,278)	(82,284)	(5,778,942)
Creditors : Due after one year		(254,853)	(724,144)	82,284	(896,713)
		(2,513,301)	1,183,536	-	(1,329,765)



Notes to the Financial Statements for the Year Ended 31 August 2020

1) Accounting Policies

The financial statements have been prepared in accordance with statutory requirements and with the Statement of Recommended Practice for Charities (SORP 2015) (Second Edition, effective 1 January 2019 and with the Financial Reporting Standard applicable to the UK and Republic of Ireland (FRS102) (Effective 1 January 2015). The particular accounting policies adopted are described below. The financial statements are prepared under the historical cost convention, as modified to include certain tangible fixed assets at a valuation and fixed asset investments at market value.

The Portsmouth Diocesan Trust meets the definition of a public benefit entity under FRS102.

a) Basis of Preparation

The financial statements represent the Portsmouth Diocesan Trust together with its wholly owned trading subsidiary companies (consolidated on a line by line basis) listed in note 18. No separate Statement of Financial Activities has been presented for the Charity alone.

b) General Information

The financial statements represent the Portsmouth Diocesan Trust together with its wholly owned trading subsidiary companies (consolidated on a line by line basis) listed in note 16. Since the consolidated

balance sheet is not materially different from the Trust balance sheet only a consolidated balance sheet and consolidated notes to the accounts have been presented.

c) Accounts on a going concern basis

Having considered future budgets and cash flows, the trustees confirm that they have no material uncertainties about the entity's ability to continue as a going concern. In coming to this conclusion trustees have considered the effect of COVID-19 and the resources that the charity has available. To accommodate the issues around COVID-19 the charity is making use of government support, has arranged for increased cash flow facilities and has adjusted long term plans for expected long term impact of the virus on the country and the economy.

d) Legacies, Donations and Grants

Legacies and donations are recognised the Diocese becomes legally entitled to them, receipt is probable and they can reasonably be measured in financial terms. Receipts of property, investments or other gifts in kind are included at market value. Grants are recognised when receivable.

e) Investment Income

Investment income is accounted for on an accruals basis.

f) Taxation

As a registered charity, the Diocese is exempt from income tax, corporation tax and capital gains tax derived from its charitable activities. Gift aid is credited to the category of income to which it relates.

g) Expenditure

Costs of raising funds comprise those costs associated with attracting voluntary income and grants and the management of the Charity's investments.

Costs of charitable activities consist of all expenditure directly relating to the objects of the Charity. Support costs which cannot be directly allocated are apportioned between activities.

Employment benefits, including holiday pay, are recognised in the period in which they are earned. Termination benefits are recognised in the period in which the decision is made and communicated to the relevant employee(s).

Governance costs include expenditure on management and compliance with constitutional and statutory requirements together with an allocation of support costs.

Irrecoverable VAT is included with the category of expenses to which it relates.

h) Schools Building Programme

Any grants obtained on behalf of school governors are netted off against total costs and only the residual cost to the Diocese is included in the financial statements.

i) Tangible Fixed Assets

Prior to 1 January 1997 the cost of fixed assets was written off in the year of acquisition and no comprehensive cost records were maintained.

In order to arrive at a reasonable valuation of parish property, taking into account age, type, condition and life expectancy, the Trustees considered that the then insured values should be discounted by 90% and in subsequent years be depreciated at 2% per annum, on the building value only. Properties acquired after 31 August 1996 are capitalised at their actual cost of acquisition.

The Diocese owns a number of properties that are occupied and run by independent charities in the form of Voluntary Aided Schools and Catholic Academies. The school properties (land and buildings) are vested in the name of the Trustees. The Trustees cannot take a unilateral decision to dispose of these properties. Disposal can only occur if the school governors and the Secretary of State for Education decide that all or part of a school site is no longer required for education. In most circumstances, where a disposal occurs, the Secretary of State or the local authority may be entitled to recoup any grant. Although no rights of ownership vest in the school governing body, most other rights and obligations, such as for the maintenance and repair of the school and its facilities, are passed to the governors. The Trustees therefore consider that there is no capital value to the Diocese in the stock of school buildings.

Thus school properties have not been capitalised. There is a potential value, or contingent asset, in the event of a closure of a school (either connected to a re-organisation or not). Such an asset is recognised only upon the occurrence of a closure/re-organisation and the site's development value becoming certain, such as upon the granting of planning permission. The recognition of this value is accounted for as an incoming resource in the year in which this value becomes measurable and certain.

Prior to 4 September 1934, the date of the original Trust Deed of the Charity, most parish properties were acquired on trusts related to individual parish missions and were formally brought under the legal control of the Trustees by virtue of Charity Commission schemes dated 4th and 7th February 1936. These assets are included in Parochial Funds.

There are a few properties held on trusts created after 1934 which are different from those in the 1934 and 2002 trust deeds. These assets are also included in Parochial Funds.

The estimated cost of furniture, equipment and motor vehicles held at 31 August 1996 has been capitalised in the financial statements. Subsequent additions in excess of £5,000 are capitalised at cost.

Individual works of art, historical treasures and plate are not capitalised.

Depreciation is calculated by the straight line method to write off the cost/value less anticipated residual value, over the expected useful lives of assets as follows: -

● Freehold property (excluding land)	50 years
● Leasehold property	50 years or, if less, the term of the lease
● Furniture and equipment	5 to 20 years

j) Significant judgements and key sources of estimation uncertainty

In preparing these financial statements the trustees have had to make estimates and assumptions that affect the amounts recognised in these financial statements. Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. Key areas subject to judgement and estimation are as follows:

Fixed asset depreciation. Judgement is applied when assigning anticipated average lives to the fixed assets of the charity.

k) Pensions

All eligible staff may join a personal pension scheme of their choice to which the Diocese makes a matching contribution of up to five per cent of salary. As a defined contribution scheme, no liability falls upon the Diocese, as employer, to make good a shortfall of funding other than contributions due.

l) Financial instruments

The Diocese only enters into basic financial instruments transactions that result in the recognition of financial assets and liabilities like trade and other accounts receivable and payable and investments in stocks and shares. The measurement basis used for these financial instruments is detailed below.

Investments

Investments are valued at fair value on the balance sheet date. Investment properties are stated at market value or a Trustees' valuation, as advised by a qualified Chartered Surveyor.

Gains/losses on investments are calculated as the difference between opening market value and closing market value after adjusting for additions and disposals during the period. No distinction is made between realised and unrealised gains in the financial statements.

Debtors

Short term debtors are measured at transaction price, less any impairment. Loans receivable are measured initially at fair value, net of transaction costs, and are measured subsequently at amortised cost using the effective interest method, less any impairment.

Cash and cash equivalents

Cash is represented by cash in hand and deposits with financial institutions repayable without notice of not more than 24 hours. Cash equivalents are highly liquid investments that mature in no more than three months from the date of acquisition and that are readily convertible to known amounts of cash with insignificant risk of change in value.

Creditors

Short term creditors are measured at the transaction price. Other financial liabilities, including bank loans, are measured initially at fair value, net of transaction costs, and are measured subsequently at amortised cost using the effective interest method. The charity only enters into basic financial instruments transactions that result in the recognition of financial assets and liabilities like trade and other accounts receivable and payable and investments in stocks and shares. The measurement basis used for these financial instruments is detailed below

m) Parochial Funds

Each Parish is considered by Canon Law to be a juridical person with corresponding rights and obligations, including the holding and use of funds. The use of these parochial funds is the responsibility of the Parish Priest, Diocesan Finance Council and the Trustees in varying ways depending on the amount and significance of the funds. However, for the purposes of civil law parishes are not distinct legal entities and, unless there are distinct and express special trusts clearly evidenced in law, parochial funds are therefore shown as unrestricted but designated funds.

n) Permanent Endowment Funds

The capital of Permanent Endowment Funds must be maintained intact with any income arising being available for restricted or general charitable purposes of the Diocese, according to the terms of the original gift.

o) Fund accounting

Unrestricted funds comprise accumulated surpluses and deficits on general funds. They are available for use at the discretion of the Trustees in furtherance of the general charitable objectives.

Designated funds are funds set aside by the Trustees for specific purposes (see note 13).

Restricted funds are used for specific purposes as stated by the grantor. Expenditure which meets these criteria is charged to the fund (see note 12).

2) Income from Charitable Activities

	Year End 31 Aug 2020	Year End 31 Aug 2019
	£	£
Hall/Centre Income	487,933	842,583
Rents Received	384,576	525,839
Fees and SLA Income	219,818	346,802
Grant or Furlough Income	507,568	50,434
	£1,599,895	£1,765,658

3) Investment Income

	Year End 31 Aug 2020	Year End 31 Aug 2019
	£	£
Income from listed investments	204,801	319,401
Rent on investment property	650,754	567,546
Bank interest	3,614	1,119
	£859,169	£888,066



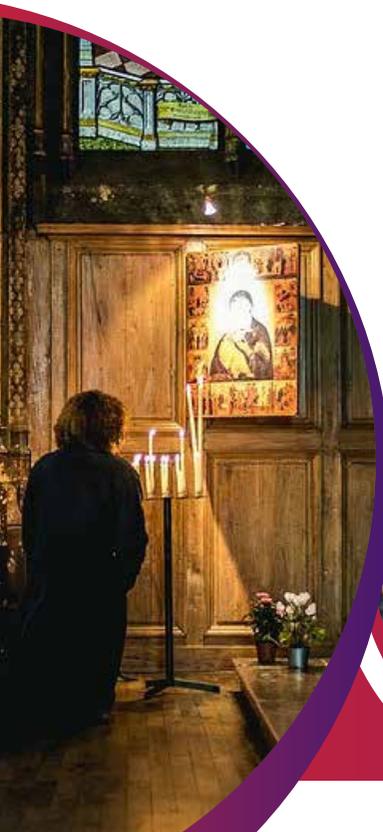
4) Charitable Expenditure

	Support of Parish Life		Vocation		
	Locally Incurred Costs	Centrally Incurred Costs	Training New Clergy	Supporting Clergy in ministry	S Re
	£	£	£	£	
Direct Costs	-	-	59,758	393,057	
The Office of the Bishop	-	179,312	-	-	
Chancery	-	10,665	-	-	
Tribunal	-	41,781	-	-	
Hospital Chaplaincies	-	46,716	-	-	
Parish Initiatives	-	32,099	-	-	
Seminary Fees	-	-	258,900	-	
Maintenance of Catholic Schools	-	-	-	-	
Parish Costs					
Clergy	1,535,930	-	-	-	
Staff	1,946,654	-	-	-	
Church Running Costs	929,511	-	-	-	
Office and Presbytery Running Costs	926,511	-	-	-	
Parish Centre Running Costs	166,868	-	-	-	
Other Costs	1,324,722	-	-	-	
Insurance	391,965	-	-	-	
Repairs and Maintenance	2,095,344	-	-	-	
Depreciation	802,425	-	-	-	
	10,119,930	310,573	318,658	393,057	
*Allocation Basis	Support Costs				
Based on work done	Communications	23,480	23,479	4,695	4,695
Based on work done	Estates	131,616	-	-	-
Apportioned based on number of team members	People	112,142	-	1,174	1,174
Apportioned based on number of team members	IT	122,974	-	5,151	5,151
Apportioned based on Direct costs	Finance	296,628	9,103	9,340	11,521
Apportioned based on Direct costs	Governance	22,938	704	722	891
Apportioned based on Share of overhead costs	Curia Property and overheads	173,617	30,095	4,543	5,322
Based on Number of clergy	Safeguarding	154,951	-	1,534	3,068
	Bishops Conference Levy	-	116,597	-	-
	Total	11,158,276	490,551	345,817	424,879

	Education		Evangelisation		Fundraising	Trading Subsidiaries	Total
Supporting Retired Clergy	Supporting Catholic Education	Youth and University Chaplaincies	Supporting the Poor and Marginalised - Inspired by the Love of Christ	New Evangelisation	Fundraising	Trading Subsidiaries	Total
£	£	£	£	£	£	£	£
30,938	260,933	245,445	175,821	88,452	55,395	376,108	1,685,907
-	-	-	-	-	-	-	179,312
-	-	-	-	-	-	-	10,665
-	-	-	-	-	-	-	41,781
-	-	-	-	-	-	-	46,716
-	-	-	-	-	-	-	32,099
-	-	-	-	-	-	-	258,900
-	327,762	-	-	-	-	-	327,762
-	-	-	-	-	-	-	1,535,930
-	-	-	-	-	-	-	1,946,654
-	-	-	-	-	-	-	929,511
-	-	-	-	-	-	-	926,511
-	-	-	-	-	-	-	166,868
-	-	-	-	-	-	-	1,324,722
-	-	-	-	-	-	-	391,965
-	-	-	-	-	-	-	2,095,344
-	-	-	-	-	-	-	802,425
30,938	588,695	245,445	175,821	88,452	55,395	376,108	12,703,072
-	4,695	4,695	4,695	4,695	18,783	-	93,912
65,808	65,808	-	-	-	-	-	263,232
587	2,349	1,174	1,761	587	587	-	121,535
2,575	10,301	5,151	7,726	2,575	2,575	-	164,179
907	17,255	7,194	5,154	2,593	1,624	-	361,319
70	1,334	556	399	200	126	-	27,940
14,045	20,737	5,927	4,579	2,757	4,758	-	266,380
-	1,534	10,739	3,068	3,068	-	-	177,962
-	-	-	-	-	-	-	116,597
114,930	712,708	280,881	203,203	104,927	83,848	376,108	14,296,128

5) Net Income

	Year End 31 Aug 2020	Year End 31 Aug 2019
	£	£
Consolidated Net income is stated after charging:		
Depreciation - Owned Assets	958,714	881,448
Auditors Remuneration	45,000	47,100



6) Staff

	Year End 31 Aug 2020	Year End 31 Aug 2019
	£	£
Staff Costs:		
Wages and salaries	2,837,134	3,307,291
Social security	185,356	200,648
Pension costs	80,119	59,086
Redundancy costs	7,651	54,292
Total	£3,110,260	£3,621,317

The average number of total employees (not full time equivalents) of the Diocese during the period and their aggregate emoluments are shown below

Monthly Average Number of Employees:	2020	2019
	£	£
Departments	39	56
Parishes	201	204
Total	240	260

Employees with emoluments greater than £60,000:	2020	2019
£60,001 - £65,000	1	1
£80,001 to £85,000	2	1
£95,001 to £100,000	1	0

Key management personnel received salary, benefits and pension contributions of £400,838 (2019: £141,799) during the year.

7) Tangible Fixed Assets

The Diocese also owns a number of properties, which are occupied and run by independent charities in the form of Voluntary Aided Schools and Catholic Academies. The Trustees consider that these properties have no capital value to the Charity - see Accounting Policy (f). The total re-instatement cost of these schools is approximately £300m. A list of the schools in the Diocese is set out on the Diocesan website (www.portsmouthdiocese.org.uk).

All fixed assets are used in direct furtherance of the Charity's objects.

Fixed assets with a Net Book Value of £3.3 million were held by the trading company (Accumulated depreciation £1.6 million, current year charge £96K). This is predominantly property owned in Jersey that has been transferred to a trading company to better comply with Jersey laws.

	Freehold Buildings	Leasehold Buildings	Furniture and Equipment	Total
	£	£	£	£
COST OR VALUATION				
At 1 September 2019	52,737,073	533,228	2,740,465	56,010,766
Additions	687,491	-	118,697	806,188
Disposals	(207,543)	-	-	(207,543)
At 31 August 2020	53,217,021	533,228	2,859,162	56,609,411
DEPRECIATION				
At 1 September 2019	11,144,589	65,641	2,238,610	13,448,840
Charge for the period	824,638	42,820	91,256	958,714
On disposals	(32,018)	-	-	(32,018)
At 31 August 2020	11,937,209	108,461	2,329,866	14,375,536
NET BOOK VALUE				
At 31 August 2020	41,279,812	424,767	529,296	42,233,875
At 31 August 2019	41,592,484	467,587	501,855	42,561,926

At 31 August 2020 the Charity had future minimum lease payments under non-cancellable operating leases as follows:

Land and Buildings	2020	2019
	£	£
Not later than 1 year	25,000	25,000
Later than 1 year and not later than 5 years	0	100,000
Later than 5 years	0	75,000
Total	25,000	175,000

8) Investments

	Investment Properties	Quoted Investments	Total
	£	£	£
Fixed Assets			
Market value at 1 September 2019	16,575,900	11,304,256	27,880,156
Additions	-	2,156,757	2,156,757
Disposals	-	(2,374,375)	(2,374,375)
Revaluation Losses	(940,900)	(120,313)	(120,313)
Market value at 31 August 2020	15,635,000	10,966,325	26,601,325

All quoted investments (other than cash) are quoted on a recognised UK Stock Exchange or are valued by reference to investments listed on a recognised Stock Exchange. No figure for the cost of the investment properties owned at 1 January 1997 is available; the value at which they were first recognised in the accounts was £1,014,500. £9.8 million of investment properties were revalued at 31 August 2019 by Daniel Harrison Surveyors and £5.6 million of investment properties were valued at 31 August 2020. The Trustees do not believe that there is a material movement in the value of investment properties since the date they were last revalued.

9) Debtors

	31 Aug 2020	31 Aug 2019
	£	£
Due after more than one year		
School and other loans	135,643	222,187
Due within one year		
School and other loans	385,978	1,072,801
Other debtors and prepayments	441,779	393,362
	£827,757	£1,466,163

10) Creditors

	2020	2019
	£	£
Due after more than two years		
School and other loans	600,145	170,569
Due between one and two years		
School and other loans	296,568	84,284
Due within one year		
School and other loans	5,061,381	2,827,694
PAYE	72,062	56,022
Other creditors and accruals	645,499	975,864
	5,778,942	3,859,580

A loan of £1,000,000 from Lloyds Bank was taken out in October 2019 for a five year commitment period at an interest rate of 1.7% above LIBOR. After an initial 12 month holiday period quarterly repayments will be made with the loan to be repaid in full on the fifth anniversary unless the Bank agrees to extend the commitment period.



11) Permanent Endowment Funds

	Balance at 31 Aug 2019	Net Incoming/ (Outgoing) Resources	Movement on Investments	Balance at 31 Aug 2020
	£	£	£	£
Local Mission Funds				
Properties	371,654	(7,639)	(18)	363,997
Other	145,260	2,984	(1,486)	146,757
St Mary's Mission	214,398	681	(565)	214,514
Total	731,312	(3,975)	(2,069)	725,268
Mission Support Funds	42,094	(1,150)	(1,373)	39,571
	773,406	(5,125)	(3,442)	764,839

Prior year comparatives are provided in note 23



12) Restricted Funds

	Balance at 31 Aug 2019	Incoming Resources	Resources Expended	Transfers	Movement on Investments	Balance at 31 Aug 2020
					£	£
MISSION SUPPORT						
Social Welfare	165,085	4,336	-	-	(5,645)	163,776
Clergy Training	898,319	70,054	(305,896)	-	(31,049)	631,428
Bamenda Fund	34,889	93,831	(98,463)	-	(157)	30,100
Clergy Assistance	98,981	10,891	(18,431)	-	(3,385)	88,056
Lourdes Fund	173,286	5,167	-	-	(5,205)	173,248
Youth Funds	782	-	-	-	-	782
Vicariate Triple Trust	71,882	1,807	(16,911)	-	(2,458)	54,320
Edmund Rice Fund	281,841	6,432	-	-	(9,638)	278,635
School Building Fund	194,220	246,672	(327,762)	-	-	113,130
Other Restricted Funds	59,290	270	(1,200)	-	(1,749)	56,611
Diocesan Caritas	1,075	159,729	(57,574)	-	-	103,230
	1,979,650	599,189	(826,237)	-	(59,286)	1,693,316
LOCAL MISSION						
Parish Fund Raising	110,507	1,235,248	(968,449)	-	-	377,306
Investment Funds	837,308	12,738	-	-	(6,957)	843,089
Foundation Masses	160,706	1,205	(2,049)	-	-	159,862
Caritas Jersey Ltd	21,283	94,669	(98,716)	-	-	17,236
	1,129,804	1,343,860	(1,069,214)	-	(6,957)	1,397,493
	£3,109,454	£1,943,049	(1,895,451)	-	(66,243)	3,090,809

Prior year comparatives are provided in note 23

Mission Support

Social Welfare Fund

This is a fund dating from 1952 for the promotion of Social Welfare generally.

Clergy Training Fund

A fund for the training of students to the priesthood, which is the recipient of a specific annual Diocesan collection for this purpose. A transfer is made to the General Fund from which the training costs are paid.

Bamenda Fund

A fund to provide assistance to the Diocese of Bamenda in Cameroon, Africa that is the recipient of a specific annual Diocesan collection. There is a Trustees' committee charged with monitoring and making the appropriate grants.

Clergy Assistance

This fund provides financial support for clergy in need and is the recipient of a specific annual Diocesan collection.

Youth Funds

Funds collected specifically for youth purposes including Lourdes Pilgrimages and Summer Schools.

Diocesan Caritas

Caritas Diocese of Portsmouth supports and promotes the love of neighbour in the parishes and schools of the Diocese.

Vicariate Triple Trust

The purpose of the Trust is primarily to assist parishes in providing church furnishings.

Edmund Rice Fund

This donation was received in 2005, primarily for education purposes in Reading and surrounding areas, and the local pastoral area is developing support for appropriate chaplaincies in the area.

School Building Fund

This Fund was established in 2001, to provide a central fund to meet the governors' liabilities on expenditures in Voluntary Aided schools. The equalisation fund is targeted as half from all parishes on the mainland, whether feeder parishes or not, and the balance being raised by the schools from parental contributions.

Other Restricted Funds

Other restricted funds consist of donations and other contributions for specific purposes other than those listed above, each not exceeding a period end balance of £50,000.

Local Mission

Parish Fund Raising

These are funds that parishes raise for separate funds and charities, and account for as a restricted fund.

Investment Funds

These are mainly legacies left specifically for expenditure within individual parishes or churches.

Foundation Masses

Legacies left for Mass intentions of the deceased, are held as separate funds within the parishes.

Caritas Jersey Ltd

Caritas Diocese of Portsmouth supports and promotes the love of neighbour in the parish of Jersey.

13) Designated Funds

	Balance at 31 Aug 2019	Incoming Resources	Transfers/ Resources Expended	Movement on Investments	Balance at 31 Aug 2020
				£	£
MISSION SUPPORT					
Education Fund	64,739	14,600	-	(2,214)	77,125
Insurance Risk Fund	(8,797)	-	-	-	(8,797)
Pastoral Development Fund	1,125,868	-	-	-	1,125,868
Living Our Faith Fund	2,331,535	15,390	(539,965)	(1,864)	1,805,096
Value of Diocesan Buildings - Fund	-	-	3,075,504	-	3,075,504
	3,513,345	29,990	2,535,539	(4,078)	6,074,796
LOCAL MISSION					
Living Our Faith Fund	1,282,884	8,468	(159,912)	-	1,131,440
Value of Diocesan Buildings - Fund	-	-	39,158,371	-	39,158,371
Other Parochial Funds	62,059,570	11,623,044	(50,553,710)	(987,450)	22,141,454
	63,342,454	11,631,512	(11,555,251)	(987,450)	62,431,265
	66,855,799	11,661,502	(9,019,712)	(991,528)	68,506,061

Prior year comparatives are provided in note 23

Mission Support

Education Fund

This fund is utilised for the support of schools and other educational purposes within the Diocese.

Insurance Risk Fund

This fund has been designated to assist parishes and others to comply with safety requirements.

Pastoral Development Fund

This fund has been set up from the proceeds of the sale of a surplus property and will be supplemented from further disposals where there are surplus funds generated, in order to aid parishes with their own developments.

Local Support

Living Our Faith Fund

A programme was initiated in 2008 to raise funds (i) to provide the Diocese with sufficient funds to support independently the training of students for the priesthood and the continuing care of its ordained clergy in their ministry, to fund adult formation programmes and resources and various capital projects, and (ii) to provide parish funds to meet local needs.

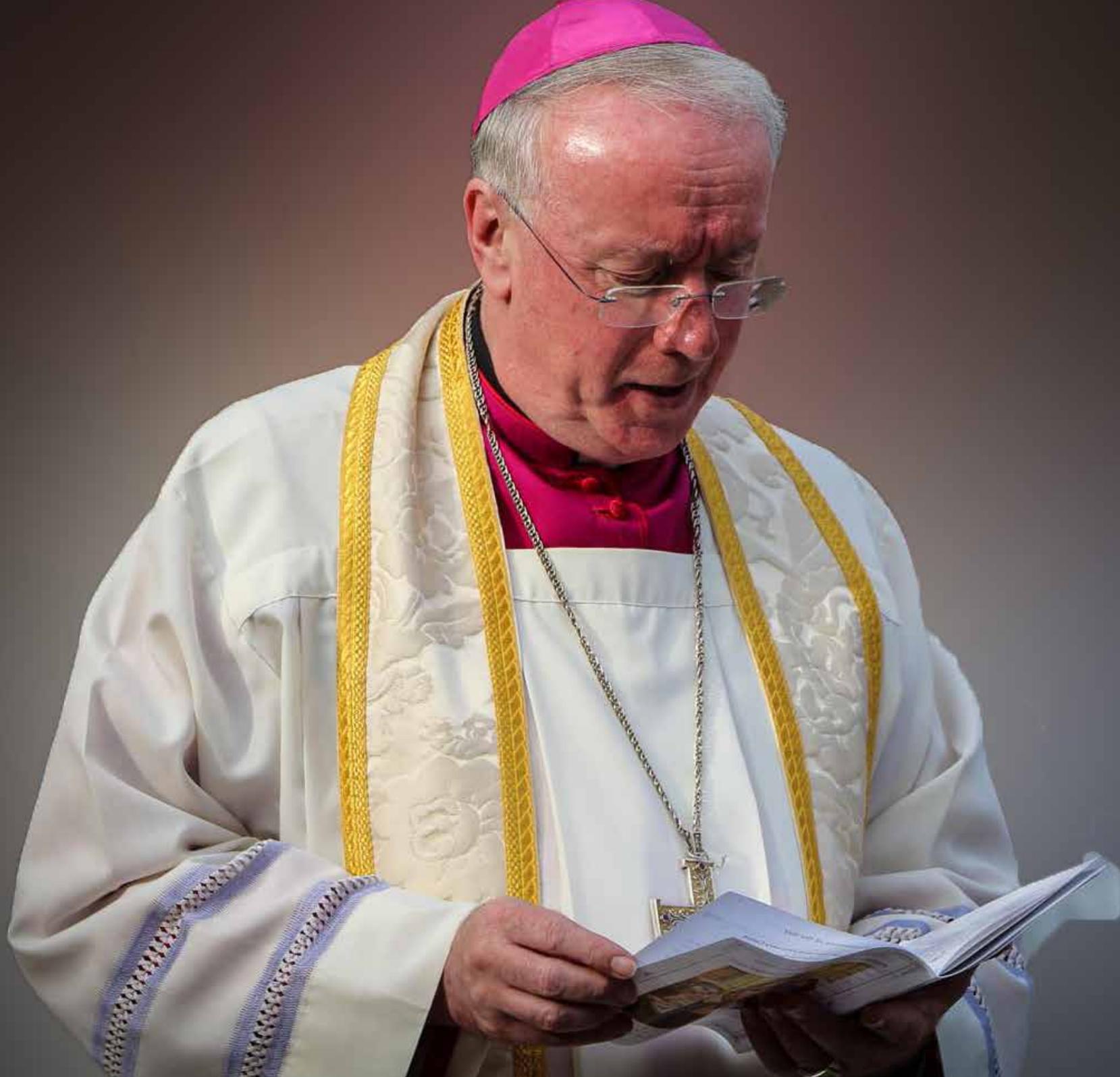
Value of Diocesan Buildings - Fund

Funds invested in buildings used by the diocese in furtherance of their charitable objects are not available to spend. The value of these operational fixed assets have been transferred into a designated fund to indicate that they are not expendable financial assets.

14) Allocation of Net Assets

	Fixed Assets	Investments	Current Assets	Current Liabilities	Parish Loan Accounts	Total 31 Aug 2020
					£	£
Permanent						
Endowment Funds						
Mission Support	-	39,571			-	39,571
Local Mission	510,455	186,435	28,378		-	725,268
Restricted Funds						
Mission Support	-	3,104,519	(1,411,203)		-	1,693,316
Local Mission	-	793,492	604,001		-	1,397,493
Unrestricted funds						
Mission Support	3,075,504	5,270,954	5,136,770	(6,255,498)	(5,045,808)	2,181,922
Local Mission	38,647,916	17,206,354	1,951,344	(420,157)	5,045,808	62,431,265
Total Net Assets	42,233,875	26,601,325	6,309,290	(6,675,655)	-	68,468,835

Prior year comparatives are provided in note 23



15) Transaction with Trustees

Certain Trustees are also priests within the Diocese. As priests they receive income from their office together with living accommodation, living expenses and reimbursement of costs incurred on behalf of their parish on the same basis as other priests within the Diocese. No Trustees receive any remuneration or benefits from their trusteeships. No Trustees were paid for providing professional services to the Diocese. No trustees were reimbursed travel expenses in their capacity as Trustees (2019, two trustees £1,409). Donations totaling £11,365 (2019: £11,400) were received from trustees during the year.

16) Capital Commitments

	2020	2019
Authorised and Contracted for	-	395,859

17) Connected Charity

The following charity is a connected charity of The Portsmouth Diocesan Trust:

Charity: Portsmouth Roman Catholic Diocese Priests' Retirement Fund

Charity Number: 1061194

Address: St Edmund House, Bishop Crispian Way, Portsmouth PO1 3QA

18) Trading Subsidiaries

During the period the Diocese had wholly owned active subsidiary companies incorporated in England and Wales. They were as follows: -

- The Portsmouth Diocesan Trading Co Limited
(Company Number: 2746549)
- Catholic Resource Centre Limited
(Company Number: 3141601)
- City Centre Parish Gift Shop Ltd
(Company Number 4861772)
- Our Lady of Peace Catholic Club Limited
(Company Number: 3340552)
- Waterside Fair Trading Limited
(Company Number: 3454820)
- Portsmouth Roman Catholic Diocesan Properties Limited
(Company Number: 9611450)

The results and assets and liabilities of the above companies are reported within the financial statements.

Portsmouth Roman Catholic Diocesan Trust Company Limited (Company Number: 9003096) acts as Member of Caritas Jersey Limited, a Jersey registered charitable company, whose results and assets and liabilities are reported within the financial statements.

A summary of the companies' trading results and balance sheets is set out -

Consolidated Profit and Loss Account For the Year Ended 31 Aug 2020	31 Aug 2020	31 Aug 2019
	£	£
TURNOVER	257,405	225,626
Cost of sales	(150,153)	(69,842)
GROSS PROFIT	107,252	155,784
Administrative expenses	(157,741)	(142,671)
	(50,489)	13,113
Amount gifted to the Charity	(56,067)	(69,283)
Transfer of Fixed Assets	3,372,687	
Tax on profit on ordinary activities	-	-
	-	-
(LOSS)/PROFIT AFTER TAXATION	3,266,131	(56,170)
Reserves brought forward	(125,535)	(69,365)
RESERVES CARRIED FORWARD	3,140,596	(125,535)

Included within turnover are sales to the Diocese amounting to £65,383 (2019 £70,625).

Consolidated Balance Sheet As at 31 Aug 2020	31 Aug 2020	31 Aug 2019
		£
FIXED ASSETS		
Tangible assets	3,310,460	58,119
CURRENT ASSETS		
Stocks	9,969	11,230
Debtors	38,253	5,420
Cash at bank and in hand	161,144	92,624
	209,366	109,274
CREDITORS: Amounts falling due within one year	(212,729)	(126,427)
NET CURRENT ASSETS	(3,363)	(17,153)
NET ASSETS	3,307,097	40,966
Share capital	166,501	166,501
Reserves	3,140,596	(125,535)
SHAREHOLDERS' FUNDS	3,307,097	40,966

19) Financial Instruments

Consolidated Balance Sheet As at 31 Aug 2020	2020	2019
		£
Financial assets measured at fair value	10,962,191	11,304,259
Financial assets measured by amortised cost	827,757	1,294,988
Financial liabilities measured by amortised cost	(6,675,654)	3,082,547

Financial assets measured at fair value comprise listed investments.

Financial assets measured at amortised cost comprise school and other loans.

Financial liabilities measured at amortised cost comprise school and other loans.

20) Post Balance Sheet Events

In February 2021 the Diocese borrowed £4 million under the government's CBILS scheme to provide support cash flows in entities that have been affected by the COVID -19 pandemic.

21) Consolidated Statement of Financial Activities for the Year Ended 31 August 2019

	Unrestricted Funds Local Mission	Unrestricted Funds Mission Support	Restricted Funds	2019
	£	£	£	£
Income from:				
Donations and legacies				
Donations and Offertories	9,047,112	21,150	958,086	10,026,348
Legacies	356,950	0	85,295	442,245
Charitable activities	1,339,651	374,960	51,047	1,765,658
Income from trading subsidiaries	233,418	0	0	233,418
Investment income	716,283	83,423	88,360	888,066
Other income	349,623	136,363	72,103	558,089
Gain on disposal of fixed assets	1,375,088	0	0	1,375,088
Total income	13,418,125	615,896	1,254,891	15,288,912
Expenditure on				
Raising funds				
Expenses of trading subsidiaries	289,846	-	9,811	299,657
Fundraising	-	-	-	-
Charitable activities				
Support of Parish Life	11,159,282	879,489	620,757	12,659,528
Vocation				
Training New Clergy	-	463,848	-	463,848
Clergy Support	-	433,737	-	433,737
Supporting Retired Priests	-	97,496	-	97,496
Education				
Supporting Catholic Education	-	498,191	331,452	829,643
Youth and University Chaplaincies	-	362,937	-	362,937
Evangelisation				
Supporting the Poor and Marginalised - Inspired by the Love of Christ	-	124,447	149,901	274,348
New Evangelisation	-	109,925	6,328	116,253
Total expenditure	11,449,128	2,970,070	1,118,249	15,537,447

21) Consolidated Statement of Financial Activities for the Year Ended 31 August 2019 Continued

	Unrestricted Funds Local Mission	Unrestricted Funds Mission Support	Restricted Funds	2019
	£	£	£	£
Net (Outgoing)/Incoming Resources before transfers	1,968,997	(2,354,174)	136,642	(248,535)
Realised and Unrealised (Losses) on Investments	(1,428,804)	841,400	23,666	(563,738)
Net income/(expenditure)	540,193	(1,512,774)	160,308	(812,273)
Transfers between Funds	(461,915)	624,125	(162,210)	-
Transfers - Support Costs	995,412	(995,412)	-	-
Transfers - Diocesan Levy	(2,161,627)	2,161,627	-	-
Net movement on funds	(1,087,937)	277,566	(1,902)	(812,273)
Reconciliation of funds				
Fund balances brought forward	64,430,391	2,114,051	3,884,762	70,429,204
Fund balances carried forward	63,342,454	2,391,617	3,882,860	69,616,931



22) Charitable Costs

for the Year Ended 31 August 2019

	Support of Parish Life		Vocation	
	Locally Incurred Costs	Centrally Incurred Costs	Training New Clergy	Supporting Clergy in ministry
	£	£	£	£
Direct Costs	-	-	79,472	399,761
The Office of the Bishop	-	240,051	-	-
Chancery	-	27,716	-	-
Tribunal	-	47,832	-	-
Hospital Chaplaincies	-	58,320	-	-
Parish Initiatives	-	79,303	-	-
Seminary Fees	-	-	350,737	-
Maintenance of Catholic Schools	-	-	-	-
Parish Costs				
Clergy	1,709,624	-	-	-
Staff	2,029,871	-	-	-
Church Running Costs	1,075,757	-	-	-
Office and Presbytery Running Costs	1,421,086	-	-	-
Parish Centre Running Costs	202,994	-	-	-
Other Costs	1,489,191	-	-	-
Insurance	392,171	-	-	-
Repairs and Maintenance	1,855,588	-	-	-
Depreciation	814,922	-	-	-
	10,991,204	453,222	430,209	399,761
*Allocation Basis	Support Costs			
Based on work done	Communications	55,819	55,819	7,975
Based on work done	Estates	98,950	-	-
Apportioned based on number of team members	People	99,836	-	1,045
Apportioned based on number of team members	IT	81,100	-	3,397
Apportioned based on Direct costs	Finance	300,885	12,411	11,777
Apportioned based on Direct costs	Governance	23,647	974	926
Apportioned based on Share of overhead costs	Curia Property and overheads	217,650	48,035	7,355
Based on Number of clergy	Safeguarding	117,525	-	1,164
	Bishops Conference Levy	-	102,451	-
	Total	11,986,616	672,912	463,848
				433,737

	Education		Evangelisation		Fundraising	Trading Subsidiaries	Total
Supporting Retired Clergy	Supporting Catholic Education	Youth and University Chaplaincies	Supporting the Poor and Marginalised - Inspired by the Love of Christ	New Evangelisation	Fundraising	Trading Subsidiaries	Total
£	£	£	£	£	£	£	£
30,192	384,740	324,365	243,436	96,577	-	299,657	1,858,200
-	-	-	-	-	-	-	240,051
-	-	-	-	-	-	-	27,716
-	-	-	-	-	-	-	47,832
-	-	-	-	-	-	-	58,320
-	-	-	-	-	-	-	79,303
-	-	-	-	-	-	-	350,737
-	331,453	-	-	-	-	-	331,453
-	-	-	-	-	-	-	1,709,624
-	-	-	-	-	-	-	2,029,871
-	-	-	-	-	-	-	1,075,757
-	-	-	-	-	-	-	1,421,086
-	-	-	-	-	-	-	202,994
-	-	-	-	-	-	-	1,489,191
-	-	-	-	-	-	-	392,171
-	-	-	-	-	-	-	1,855,588
-	-	-	-	-	-	-	814,922
30,192	716,193	324,365	243,436	96,577	-	299,657	13,984,818
-	7,974	7,974	7,975	7,974	-	-	159,483
49,475	49,475	-	-	-	-	-	197,900
523	2,091	1,045	1,568	523	-	-	107,677
1,698	6,794	3,397	5,095	1,698	-	-	106,576
827	19,604	8,879	6,664	2,644	-	-	374,633
65	1,541	698	524	208	-	-	29,443
14,716	24,806	8,434	6,759	4,302	-	-	339,486
-	1,165	8,145	2,327	2,327	-	-	134,980
-	-	-	-	-	-	-	102,451
97,496	829,643	362,937	274,348	116,253	-	299,657	15,537,447

23) Summary of Permanent Endowments for the Year Ended 31 August 2019

Permanent Endowment Funds	Balance at 31 Aug 2018	Net Incoming/ (Outgoing) Resources	Movement on Investments	Balance at 31 Aug 2019
	£	£	£	£
LOCAL MISSION				
Properties	379,506	(7,852)	-	371,654
Other	140,897	-	4,363	145,260
St Mary's Mission	212,769	-	1,629	214,398
	733,172	(7,852)	5,992	731,312
MISSION SUPPORT	42,186	-	(92)	42,094
	775,358	(7,852)	5,900	773,406



23) Summary of Restricted Funds for the Year Ended 31 August 2019

Restricted Funds	Balance at 31 Aug 2018	Incoming Resources	Resources Expended	Transfers	Movement on Investments	Balance at 31 Aug 2019
				£	£	
MISSION SUPPORT						
Social Welfare	160,104	5,418	-	-	(437)	165,085
Clergy Training	924,850	116,539	-	(138,604)	(4,466)	898,319
Bamenda Fund	89,177	46,554	(100,716)	-	(126)	34,889
Clergy Assistance	79,791	54,006	-	(34,005)	(811)	98,981
Lourdes Fund	169,197	39,249	(34,816)	-	(344)	173,286
Youth Funds	781	1	-	-	-	782
Vicariate Triple Trust	74,599	2,259	(4,794)	-	(182)	71,882
Edmund Rice Fund	278,272	8,040	(3,822)	-	(649)	281,841
School Building Fund	285,043	236,808	(327,631)	-	-	194,220
Other Restricted Funds	19,189	44,600	(6,579)	-	2,080	59,290
Diocesan Caritas	1,075	48,934	(48,934)	-	-	1,075
	2,082,078	602,408	(527,292)	(172,609)	(4,935)	1,979,650
LOCAL MISSION						
Parish Fund Raising	2,923	646,371	(549,187)	10,400	-	110,507
Investment Funds	838,716	-	-	-	(1,408)	837,308
Foundation Masses	160,706	-	-	-	-	160,706
Caritas Jersey Ltd	24,981	6,112	(9,810)	-	-	21,283
	1,027,326	652,483	(558,997)	10,400	(1,408)	1,129,804
	3,109,404	1,254,891	(1,086,289)	(162,209)	(6,343)	3,109,454



23) Summary of Designated Funds for the Year Ended 31 August 2019

Designated Funds	Balance at 31 Aug 2018	Incoming Resources	Transfers/ Resources Expended	Movement on Investments	Balance at 31 Aug 2019
				£	
MISSION SUPPORT					
Education Fund	47,960	18,252	-	(1,473)	64,739
Insurance Risk Fund	(8,797)	-	-	-	(8,797)
Pastoral Development Fund	674,353	-	451,515	-	1,125,868
Living Our Faith Fund	3,293,849	22,678	(984,869)	(123)	2,331,535
	4,007,365	40,930	(533,354)	(1,596)	3,513,345
LOCAL MISSION					
Living Our Faith Fund	1,389,285	12,509	(118,910)	-	1,282,884
Other Parochial Funds	63,041,106	13,405,615	(12,958,349)	(1,428,802)	62,059,570
	64,430,391	13,418,124	(13,077,259)	(1,428,802)	63,342,454
	68,437,756	13,459,054	(13,610,613)	(1,430,398)	66,855,799

23) Summary of the Allocation of Net Assets for the Year Ended 31 August 2019

Allocation of Net Assets	Fixed Assets	Investments	Current Assets	Current Liabilities	Parish Loan Accounts	Total
			£	£	£	£
Permanent						
Endowment Funds						
Mission Support	-	40,426	1,668	-	-	42,094
Local Mission	518,307	128,053	84,952	-	-	731,312
Restricted Funds						
Mission Support	-	3,176,400	(1,196,750)	-	-	1,979,650
Local Mission	-	998,015	131,789	-	-	1,129,804
Unrestricted Funds						
Mission Support	3,313,115	5,366,218	2,510,745	(3,616,305)	(5,182,156)	2,391,617
Local Mission	38,730,504	18,171,044	1,756,878	(498,128)	5,182,156	63,342,454
Total Net Assets	42,561,926	27,880,156	3,289,282	(4,114,433)	£ -	69,616,931



Charity Information

Registered Charity Name Portsmouth Diocesan Trust

Registered Charity Number 246871

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