



*Orthodox Church of The  
Nativity of the Mother of God*

*Archdiocese of Thyateira in the  
Ecumenical Patriarchate*

**BLACK COUNTRY ORTHODOX TRUST**

**TRUSTEES' REPORT AND FINANCIAL STATEMENTS**

**FOR THE YEAR ENDED 31 DECEMBER 2023**

**REGISTERED CHARITY NUMBER: 1082272**

Black Country Orthodox Trust, in pursuit of its aim to advance the Orthodox Christian faith, operates the Orthodox parish at Palfrey in Walsall in the West Midlands, under the jurisdiction of the Greek Archdiocese of Thyateira Great Britain and Ireland, to serve the Orthodox faithful of whatever nationality who live in the Black Country and local areas, and to be an Orthodox presence in the whole community.

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## **REPORT OF THE TRUSTEES OF BLACK COUNTRY ORTHODOX TRUST**

The Charity Trustees present their report together with the financial statements of the charity for the year ended 31st December 2023. The financial statements comply with both the Charity's Constitution and the Charities Act 2011.

### **Objectives and Activities**

The objects of the Charity are the advancement of the Orthodox Christian faith as contained in Holy Scripture, as practised in the life of the Church, as confirmed by the ecumenical and local councils and as interpreted, preserved and taught by the Great Church of Christ, the Ecumenical Patriarchate of Constantinople.

To carry out these objects, the Charity runs the Orthodox parish of the Nativity of the Mother of God in Palfrey, Walsall, and works for the Orthodox Church in the wider community and for an active part in the whole local community. Within the structures of the Orthodox Church, the parish is in the jurisdiction of the Archdiocese of Thyateira, Great Britain and Ireland, by whom it is currently charged to conduct the services and other matters primarily in English, so as to be accessible to Orthodox of all backgrounds and to enquirers.

### **Public Benefit**

The trustees continue to give regard to the Charity Commission's general guidance on public benefit (Charities and Public Benefit) in relation to the charitable purpose of the charity. In the opinion of the trustees, the objectives of the charity as detailed above fall within the remit of 'for public benefit'.

**The purpose of BCOT** is to run the affairs of the Orthodox parish of the Nativity of the Mother of God in Walsall, in the Archdiocese of Thyateira and Great Britain, under the Ecumenical Patriarchate. It owns the church building and the former church house next door in Dale Street, and under the Archdiocese supports the clergy and the pastoral and liturgical life of the parish. The Trustees have the first responsibility for these matters. Day-to-day practical affairs are dealt with by the Parish Committee which reports to the Trustees. The clergy take care of the pastoral and liturgical needs of the parish.

**The Trustees** held nine meetings in this period. The primary focus of these meetings was the ongoing need to find a successor for fr. John to enable him to fully retire.

The trustee board had the following changes in 2023: Mihaela Ispas, Brandon Scott - Omenka, Florina Clewer and Anne Perks remained members of the trust and from January 2023 the following roles were: Mihaela – Trustee, Brandon – Chair, Florina – Secretary and Anne – Treasurer. From January 2024 assumed the following roles: new Trustees - Steven Rollins and Florin Mihaila, Brandon – Chair, Florina – Treasurer, Tatiana – Secretary.

**Clergy** The priest in charge was Father John Nankivell, who has served the parish since it was founded in 2000. We had several cover priests visiting who covered most of the Sunday services. Those were: Father Stephen Maxfield, Father Panteleimon Maxfield, Father Nicholas Karafillides with help of newly ordained deacon David Walker. Father Ioannis Father Vasilios Koutsogiannis has kindly agreed to perform baptism services in addition to Sunday Liturgies. This all changed when the decision came that Father Theodoros Polyviou will be our new priest from November 2023. This lasted only several months due to unexpected circumstances leading to father Theodoros leaving in the beginning of 2024.

**Church life.** The main services are in English but the community comprises many ethnicities. The number of parishioners attending is steady and community is growing. During the course of the year, the parish kept contact both informally and liturgically with the local Orthodox communities of all jurisdictions.

**Community life** The church hall was let to local people throughout the year. This was used for various events and exercise classes. The hall rent was run by Rooki Alberts.

We held the annual party in honor of saint Nicholas at the end of year 2023 which was a great success. Many people attended and gifts were given to the children and especially to those in need.

**Charity Property** The Charity owns the church building in Sun Street Walsall and the church house (the former vicarage) at 63 Dale Street Walsall. It acquired the freeholds of both church and church house and their grounds from the Church of England in 2005.

The church was valued for insurance at £4,080,760 from December 2022 to December 2023 and at £4,231,129 from December 2023 to December 2024; its contents were valued at £40,746 approximately and £42,017 for those dates. The church house was valued for insurance from December 2022 to December 2023 at £598,471 and £661,043 from December 2023 to December 2024. Loss of rent from the Church House was valued for insurance from December 2023 at £73,680.

## **Work on the property**

**Church** In January 2023 the new altar table was built. A new rope for the church bell has also been installed.

**Church House** Flat 7 was let since February 2023. This means that all seven flats were let from this point.

## **Finance**

During this period income received was £85,009 (£117,717 in 2022), payments were £76,741 (£145,523 in 2022). The closing balance at the end of this financial period had increased to £20,615 compared to £12,347 at the end of the previous period.

The year-end accounts show an outstanding liability of £17,000 due to the private loans (£65,000 in total) taken in 2020, respectively 2021 to enable BCOT to finish the development of the church house. Regular monthly payments to clear this pending debt have been set-up since the beginning of 2022.

The six flats in in the church house provided continuous income throughout the year with adding the flat 7 later.

£1,625 was donated to Acorns Children's charity.

## **Reserves Policy**

The trustees continue to review the charity's requirements for reserves in light of the main risk to the organisation, a reduction of income. At the end of December 2023, the total reserves were £20,615, all of which were unrestricted.

The long-term financial strategy of the trustees remains their intention to increase the level of the reserves by continually reviewing overheads and increasing income not only through rent from the property but by securing charitable donations and increasing fundraising activities.

## **Update January to July 2024**

The trustees have held 7 meetings in 2024 so far.

The focus this year has been on finding a successor for Father John who has officially decided to retire from the role of priest in charge in our parish. The trustees have managed the handover of Father John's 'domestic' responsibilities and will continue to support the transition of the new priest. In February 2024 the new priest Father Samuel Christoforou was appointed as a new priest in charge in our parish. Since he started the church services and activities increased. We started the Bible class which takes place every Friday evening. We welcome more members Orthodox and non – Orthodox on a regular base.

Easter was held in the normal way - at midnight - with very good attendance. The stewarding volunteers did an amazing job of managing the crowds.

The 'bring and share' parish meal was organized and managed this year so far by the volunteers.

They have also arranged hospitality for Bishop Maximos's visit, which came to see our parish in May 2024.

At the end of June 2024 our volunteers organized a goodbye tea party for our beloved father John and Georgine where over 120 attended.

All flats are let and are providing stable regular income which supports the salary of the new priest.

The work room on the side of the office has been cleared and repainted. This has been done by few volunteers and the result is beautiful. This room might be useful in the future as a place for committee meetings and Sunday school lessons.

## **Conclusion**

2023 has been a challenging year for the trust both from a financial perspective as well as the instability of the priests cover situation. The trustees have worked hard to ensure that the Sunday services were always covered and that the guest priests were happy. The Archdiocese finally delivered on their promise to find us a replacement priest in November 2023. This brought the trust much hope and reassurance.

The income has been made up primarily by donations, baptisms and the rents from the Church House. The number of people attending church is increasing and we have more volunteers.

The trustees are fully dedicated to the further development of our parish and remain continuously aware of all its needs in serving its objects and are eternally grateful to all who contribute towards this goal and thankful to Almighty God for all His blessings.

## **Structure, Governance and Management**

### **Governing Document**

Black Country Orthodox Trust is an unincorporated registered charity based in the Metropolitan Borough of Walsall in the West Midlands. It is governed by a Constitution approved on 7<sup>th</sup> May 2000 and was entered on the Register of Charities by the Charity Commission of England and Wales on 4<sup>th</sup> September 2000.

### **Organisational Structure**

The charity has a committee consisting of at least three but no more than thirteen individuals. The committee may consist of a chair, up to nine elected committee members and three members co-opted by the committee members to hold office until the next AGM. The charity trustees are responsible for the strategic direction and policy of the charity.

### **Recruitment and Appointment of Committee Members**

All committee members are required to be members of the Church prior to being recruited as a charity trustee. One third (or a number nearest one third) of the elected committee members must retire at each Annual General Meeting (AGM) and new committee members are elected to replace those retiring from office. Every committee member must sign a declaration of willingness to act as a charity trustee before they are eligible to vote at any meeting of the committee. The board of committee members is well represented by a wide range of individuals from various aspects of the church community.

### **Trustee Induction and Training**

Whilst there was no formal induction process in 2023, there was an induction process in place introduced in 2024. All new committee members are invited and encouraged to visit the offices of Black Country Orthodox Trust in order to familiarise themselves with the organisation and the context within which it operates. The trustee will discuss the following aspects of the organisation with the new committee member and answer any questions arising.

- The role, responsibility and obligations of the charity trustees
- The main documents which set out the operational framework for the charity
- The current financial position as set out in the latest published accounts
- Future plans and objectives of the charity

In addition to the above, a copy of the latest Annual Report is given to all new committee members along with a charity trustee role description, a copy of the constitution, the Charity Commission's Trustee Handbook, the organisation's main policy documents and the latest financial statement

### **Risk Management**

The trustees continue to monitor any potential financial and/or governance challenges that they may face. Whilst the trustee body has not formally conducted its own review of other major risks to which the charity may be exposed to, systems have been established to mitigate any identified risks.

The risk of not being able to adequately fund the charity is the biggest risk, which is why the trustees are keen to increase their money unrestricted reserves as a contingency for any emergencies. As and when required, trustees review, amend and update working procedures to help eliminate risks.

Procedures are in place to ensure compliance with Health and Safety for all visitors whilst on charity property. These procedures are periodically reviewed to ensure that they continue to meet the needs of the charity. Disclosure and barring checks are made on all members of staff and potential new volunteers where appropriate. General Data Protection Regulations are adhered to as well as Safeguarding Adults and Child Protection policies regarding all work with children and families.

### **Responsibilities of the Trustees**

The trustees must hold a minimum of six meeting a year, there must be a quorum of three trustees present at each. Nine meetings have been held during 2023; out of which four were virtually. The Annual General Meeting was held in church on Sunday, 19<sup>th</sup> November 2023.

At each meeting trustees receive regular reports from the clergy and other groups. The ‘Parish Committee’ was dissolved and the trustees committee has taken responsibility of all the activity. The trustees reviewed and updated procedures and attended as necessary to regulatory matters and oversaw the management of the activities of the Charity as described above.

Charity law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of its financial position at the end of that year.

In preparing these financial statements the Trustees are required to:

- Select suitable accounting policies and apply them consistently;
- Make judgments and estimates that are reasonable and prudent
- State whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures disclosed and explained in the financial statements; and
- Prepare the financial statements on a going concern basis unless it is appropriate to presume that the charity will not continue in existence.

The Trustees are responsible for keeping proper accounting records 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 Charity (Accounts Reports) Regulations 2008. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

**This Report was approved by the Board of Trustees on the September 2024 and was signed on their behalf by**

.....

**Brandon Scott-Omenka Chair**

.....

**Tatiana Vasiliou, Secretary**

## **Acknowledgements**

Black Country Orthodox Trust would like to thank all the faithful who support the parish with their donations, both great and small: and, to thank our Archbishop Nikitas of Thyateira and Great Britain (together with his staff) for his pastoral care and oversight of our parish and to ask for his continued prayers.

Those directly involved in parish and community work were:

Father John Nankivell, retired priest

Father Samuel Christoforou, priest in charge

Father Stephen Maxfield, cover priest

Father Panteleimon Maxfield, cover priest

Father Vasilios Koutsogiannis, cover priest

Father Nicholas Karafillides, cover priest

Georgina Nankivell, choir leader

Tatiana Vasiliou, Sunday school teacher

Oxana Costin, contracted to clean the church

Irina and Steven Rollins, managing housekeeping of the parish

Farook and Rukayya Albertus, contracted to manage the church hall bookings in the community

Boria Malazona and his team, who completed the building work on the church house

Thanks are due to all of these. Thanks also go to servers, singers, doorkeepers, workers in the office and the premises and many other volunteers and supporters for the skills, commitment, time, and prayers that they have contributed throughout the year, and to those who give financial support.

Special thanks go to the Trustees and their team for all the hard work put into managing the housekeeping of the parish.



## **Legal and Administrative Information**

Charity Name:	Black Country Orthodox Trust
Charity Status:	Unincorporated
Registered Charity Number:	1082272
Registered Office and Operational Address:	1a Sun Street Walsall West Midlands WS1 4AL
Telephone Number:	01922 633451
Email Address:	blackcountryorthodoxtrust@gmail.com
Website:	www.orthodoxwalsall.org.uk

### **Charity Trustees:**

Chair	Brandon Scott-Omenka
Treasurer	Anne Perks (stepped down Dec 2023) Florina Clewer (appointed Dec 2023)
Secretary	Florina Clewer (role change Dec 2023) Tatiana Vasiliou (appointed Dec 2023)
Trustees	Tatiana Vasiliou (role change Dec 2023) Irina Rollins Mihaela Ispas Gregory Wittwer Florin Mihaila (appointed Nov 2023) Steven Rollins (appointed Nov 2023)

### **Independent Examiner:**

Bev Richardson M.A.A.T.  
Charity AID Accountancy Services  
Woodland Lodge, Dunston Business Village  
Stafford Road, Dunston, Staffordshire, ST18 9AB

### **Banks:**

HSBC Bank  
The Bridge, Walsall, West Midlands, WS1 1LN

Co-operative Bank  
P.O. Box 250, Southway, Skelmersdale, Yorkshire, WN8 6WT

# **INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF BLACK COUNTRY ORTHODOX TRUST**

I report on the financial statements of Black Country Orthodox Trust for the year ended 31<sup>st</sup> December 2023 which are set out on pages 9 to 12.

## **Respective responsibilities of trustees and examiner**

The charity's trustees are responsible for the preparation of the financial statements. The charity's trustees consider that an audit is not required for this year (under Section 144(2) of the Charities Act 2011 ('the 2011 Act') and that an independent examination is required.

It is my responsibility to:

- Examine the accounts under Section 145 of the 2011 Act 2011
- To follow the procedures laid down in the General Directions given by the Charity Commission (under Section 145(5)(b) of the 2011 Act); and
- To state whether any particular matters have come to my attention.

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

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

## **Independent examiner's statement**

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

- (1) Which gives me reasonable cause to believe that, in any material respect, the requirements
  - To keep accounting records in accordance with Section 130 of the 2011 Act; and
  - To prepare accounts which accord with the accounting records and to comply with the accounting requirements of the 2011 Act

have not been met; or

- (2) To which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Bev Richardson M.A.A.T.

Date: September 2024

On Behalf of  
Charity AID Accountancy Services  
Woodland Lodge, Dunston Business Village  
Stafford Road, Dunston, Staffordshire, ST18 9AB

# BLACK COUNTRY ORTHODOX TRUST

## Receipts and Payments Account for the period 1<sup>st</sup> January 2021 – 31<sup>st</sup> December 2023

	Note	Unrestricted £	Restricted £	2023 £	2022 £
<b><u>RECEIPTS</u></b>					
Donations	1	40,304	0	40,304	85,482
Charitable Activities	2	35,144	0	35,144	28,691
Fundraising	3	3,105	0	3,105	1,502
Investments	4	19	0	19	2
Other Receipts	5	6,437	0	6,437	2040
<b>TOTAL RECEIPTS</b>		<b>85,009</b>	<b>0</b>	<b>85,009</b>	<b>117,717</b>
<b><u>PAYMENTS</u></b>					
Raising Funds	6	872	0	872	365
Charity Running Costs	7	20,783	0	20,783	17,429
Church & Hall Costs	8	18,275	0	18,275	26,584
Church House Costs	9	9,492	0	9,492	60,339
Activities & Events	10	2,504	0	2,504	13,509
Governance	11	815	0	815	3,297
Other Payments	12	24,000	0	24,000	24,000
		<b>76,741</b>	<b>0</b>	<b>76,741</b>	<b>145,523</b>
<b><u>ASSETS &amp; INVESTMENTS</u></b>					
Fixed Assets		0	0	0	0
Investment		0	0	0	0
		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>TOTAL PAYMENTS</b>		<b>76,741</b>	<b>0</b>	<b>76,741</b>	<b>145,523</b>
<b>Net incoming resources</b>		<b>8,268</b>	<b>0</b>	<b>8,268</b>	<b>(27,806)</b>
<b>Transfer between funds</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Cash funds from last year</b>		<b>12,347</b>	<b>0</b>	<b>12,347</b>	<b>40,153</b>
<b>TOTAL CASH FUNDS</b>		<b>20,615</b>	<b>0</b>	<b>20,615</b>	<b>12,347</b>

# **BLACK COUNTRY ORTHODOX TRUST**

## **Statement of Assets and Liabilities as at 31<sup>st</sup> December 2023**

### **ASSETS AND LIABILITIES**

	<b>Unrestricted</b>	<b>Restricted</b>	<b>Total</b>
<b>CASH FUNDS</b>			
HSBC Business Account	9,599	0	9,599
HSBC Saver Account	1,255	0	1,255
Co-op Community Account	9,596	0	9,596
Petty Cash	165	0	165
<b>OTHER MONETARY ASSETS</b>	0	0	0
<b>INVESTMENT ASSETS</b>	0	0	0
<b>ASSETS RETAINED FOR THE CHARITY'S OWN USE</b>			
Church			4,231,129
Church Contents			42,017
Church House			661,043
<b>LIABILITIES</b>			
Independent Examination			480
Loan			17,000

**The financial statements were approved by the Board of Trustees on September 2024 and were signed on their behalf by**

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**Brandon Scott-Omenka Chair**

.....

**Florina Clewer, Treasurer**

## Notes to the Accounts

### Notes to the Accounts

	Unrestricted £	Restricted £	2023 £	2022 £
<b>1 Donations</b>				
Grants & Donations	0	0	0	0
Gift Aid Offerings	19,160	0	19,160	50,421
General Offerings	12,380	0	12,380	20,386
Gift Aid Inland Revenue	4,133	0	4,133	9,340
Eon Feed in Tariff	4,631	0	4,631	5,335
Charitable Donations	0	0	0	0
	<b>40,304</b>	<b>0</b>	<b>40,304</b>	<b>85,482</b>
<b>2 Charitable Activities</b>				
Contracts	0	0	0	0
Membership	240	0	240	0
Church House Rent	31,729	0	31,729	25,601
Hall Lettings	2,120	0	2,120	2,785
Church Worship Goods	0	0	0	145
Baptism / Marriages	1,055	0	1,055	160
	<b>35,144</b>	<b>0</b>	<b>35,144</b>	<b>28,691</b>
<b>3 Fundraising</b>				
Sale of Purchased Goods	2,048	0	2,048	1,385
Special Events	0	0	0	0
Community Food	92	0	92	0
Community Giving	965	0	965	0
Family Giving	0	0	0	117
General Fundraising	0	0	0	0
	<b>3,105</b>	<b>0</b>	<b>3,105</b>	<b>1,502</b>
<b>4 Investments</b>				
Bank Interest	19	0	19	2
	<b>19</b>	<b>0</b>	<b>19</b>	<b>2</b>
<b>5 Other Receipts</b>				
Refunds	6,437	0	6,437	2,040
Miscellaneous	0	0	0	0
	<b>6,437</b>	<b>0</b>	<b>6,437</b>	<b>2,040</b>
<b>6 Raising Funds</b>				
Purchase of Goods for resale	872	0	872	365
Community Food & Events	0	0	0	0
General Fundraising	0	0	0	0
	<b>872</b>	<b>0</b>	<b>872</b>	<b>365</b>

## Notes to the Accounts continued

	Unrestricted £	Restricted £	2023 £	2022 £
<b>7 Charity Running Costs</b>				
Priest Fees	11,920	0	11,920	13,879
Priest Expenses	154	0	154	160
Insurance	7,487	0	7,487	1,673
Health & Safety	102	0	102	243
Bank Charges	195	0	195	389
IT & Telephone	393	0	393	137
Stationery, Printing, Postage	532	0	532	309
Travel	0	0	0	639
	<b>20,783</b>	<b>0</b>	<b>20,783</b>	<b>17,429</b>
<b>8 Church &amp; Hall Costs</b>				
Utility Costs	7,460	0	7,460	7,022
Church Maintenance	306	0	306	5,922
Hall Maintenance	536	0	536	715
Capital Works	0	0	0	1,996
Apse, Icons & Nartex	100	0	100	775
Church Worship Goods	4,052	0	4,052	2,645
Cleaning Costs & Materials	3,017	0	3,017	2,536
Grounds Maintenance	2,804	0	2,804	4,973
	<b>18,275</b>	<b>0</b>	<b>18,275</b>	<b>26,584</b>
<b>9 Church House Costs</b>				
Utility Costs	1,096	0	1,096	3,412
Maintenance	144	0	144	121
Capital Works	7,842	0	7,842	56,406
Cleaning Costs & Materials	410	0	410	400
	<b>9,492</b>	<b>0</b>	<b>9,492</b>	<b>60,339</b>
<b>10 Activities &amp; Events</b>				
Worship Requisites	120	0	120	11,941
Community Offerings	319	0	319	46
Sunday Food	40	0	40	177
Community Giving	1,625	0	1,625	0
Family Giving	400	0	400	1,345
	<b>2,504</b>	<b>0</b>	<b>2,504</b>	<b>13,509</b>
<b>11 Governance</b>				
Governance Costs	0	0	0	35
Independent Examination	480	0	480	480
Professional Fees	335	0	335	2,782
	<b>815</b>	<b>0</b>	<b>815</b>	<b>3,297</b>
<b>12 Other Payments</b>				
Loan Repayment	24,000	0	24,000	0
	<b>24,000</b>	<b>0</b>	<b>24,000</b>	<b>0</b>