

# St Luke's

for clergy wellbeing

## **Annual Report and Financial Statements**

Year ended 31 March 2025

Registered charity number 1123195

Charitable company limited by guarantee number 06511046

Registered name St Luke's Healthcare for the Clergy



Table of Contents

Vision, mission and values 3

Reference and Administrative Details 4

Chairman's Report 6

Strategic Report 7

Trustees' Report 18

Independent Examiner's Report 22

Statement of Financial Activities 23

Balance Sheet 24

Notes to the Financial Statements 25

# St Luke's

for clergy wellbeing

## **Our vision, mission and values**

### **Vision**

Flourishing Clergy - Healthy Church - Transformed Communities

### **Mission**

To be the church's independent evidence-based wellbeing advocate, building communities of practice whilst caring for those broken in ministry.

### **Values**

Collaboration - Integrity - Creativity - Compassion



Participants in the St Luke's Wellbeing Walk in Eastbourne, February 2025



**Reference and Administrative Details**

<b>President</b>	The Archbishop of Canterbury
<b>Trustees</b>	Anna Bardsley Gary Bell FRCPsych The Revd Canon Dr Jack Dunn The Revd Canon Stephen Fielding (Chairman since 22 Nov 2024) The Revd Hilary Ison Jan Korris (retired 22 Nov 2024) Edward Martineau (Chairman; retired 22 Nov 2024) Jean McDonald FRCS John Nugée (retired 22 Nov 2024) Graeme Pollard The Ven Rick Simpson The Rt Revd Tim Thornton
<b>Secretary</b>	Claire Walker PhD (resigned; 1 June 2025) Tim Ling PhD (appointed; 1 June 2025)



<b>Principal and registered office</b>	Room 103, Church House 27 Great Smith Street London SW1P 3AZ
<b>Charity registration number</b>	1123195
<b>Charitable company registration number</b>	06511046
<b>Registered charity name</b>	St Luke's Healthcare for the Clergy
<b>Working name</b>	St Luke's for Clergy Wellbeing
<b>Independent examiner</b>	Janice Matthews FCA Menzies LLP, Chartered Accountants 2 <sup>nd</sup> Floor, Magna House 18-32 London Road Staines-upon-Thames TW18 4BP
<b>Bankers</b>	Virgin Money 154-158 Kensington High Street London W8 7RL
<b>Solicitors</b>	Hunters Law LLP 9 New Square Lincoln's Inn London WC2A 3QN

# St Luke's

for clergy wellbeing

## Chairman's Report

It is a great pleasure to introduce myself as the Chairman of St Luke's for Clergy Wellbeing. Edward Martineau has retired after 12 years and, while he leaves big shoes to fill, I am relishing the challenge of taking St Luke's forward over the coming years.

Until Easter 2025 I was vicar of St Paul's Walden in Hertfordshire and I have a background in law and banking. As a practising mediator, I have mediated many church disputes and have trained clergy in conflict resolution.

I am strongly committed to clergy wellbeing and believe that embedding good practice, such as pastoral supervision, transforms ministry and supports clergy during inevitable times of challenge and difficulty. Pastoral supervision for clergy is our major strategic priority for the next five years. We, in partnership with The Henry Smith Charity, are working nationally with 25 dioceses to promote and embed this practice.

We are also seeing continuing demand for our 'restorative' services of psychiatric and psychological diagnosis and treatment. Requests come from clergy and their families and reflect the stresses and strains that clergy are experiencing in ministry at this time.

Changes to the Trustee body in 2024-25 were significant with the retirement not just of the Chairman but also two other long-standing Trustees, Jan Korris and John Nugée, whose input to the development of St Luke's had been considerable. We miss them, but the Board remains in excellent shape to determine the charity's strategic direction and address future challenges.

Since the end of the financial year, our Chief Executive, Claire Walker, has retired. Having been in the role for 10 years, her influence on the charity has been considerable. We are hugely grateful to her for all she has done and we are very sorry to see her go. We have appointed Tim Ling as her successor from June 2025 and believe that he will do an excellent job at leading St Luke's over the coming years, with the support of the Board and the dedicated and experienced staff team.

It is a time of unparalleled growth and development for the charity and it gives me immense satisfaction to be able to make a difference to clergy wellbeing and, in turn, help our clergy to bring vital, wide-ranging benefits to the communities they serve.



**The Revd Canon Stephen Fielding**  
Chairman

21st November 2025

# St Luke's

for clergy wellbeing

## Strategic Report

### Objectives and activities

St Luke's for Clergy Wellbeing helps clergy to flourish in their ministry, to the benefit of their congregations and the wider community. During the financial year 2024-25, St Luke's achieved its charitable objectives through three approaches:

- **Preventive** – initiatives to enhance clergy wellbeing, reduce stress and isolation, and build psychological health
- **Restorative** – one-to-one treatment and care for individual clergy and their families who are mentally unwell
- **Advocacy** – promoting clergy wellbeing and sharing learning to foster best practice.

Through these activities we help clergy to fulfil their vocation and serve their congregation and the wider community.

#### Preventive

In 2024-25, the charity's primary preventive activity was starting a five-year, £2 million programme of one-to-one pastoral supervision and reflective practice groups for clergy, working in partnership with The Henry Smith Charity. It is called the St Luke's Advancing Clergy Reflection Programme and will involve 25 dioceses of the Church of England and all six of the Church in Wales.

#### Restorative

During the year, 128 individual beneficiaries were referred for psychiatric or psychological assessment and/or treatment. This level of engagement reflects ongoing need among clergy and their families and has affirmed the Trustees' continuing focus on psychological health during the reporting period.

#### Advocacy

During the year, a Trustees and staff Awayday highlighted an increased role for St Luke's in advocacy for clergy wellbeing that will form a major focus of the charity's work in future.

### Objectives for 2025-26

The objectives identified for the coming year, 2025-26, are to:

- Increase our advocacy activities to raise the profile of clergy wellbeing and bring together key wellbeing professionals to share ideas, learning and results
- Build on the initial success of the St Luke's Advancing Clergy Reflection (ACR) Programme, involving more dioceses and enabling more clergy to access pastoral supervision
- Review our restorative provision of psychological health care, to ensure that we focus our help where it will make the most difference to clergy
- Continue to build relationships with funding partners, donors and supporters to increase our fundraising income and ensure the long-term viability of the charity.

In deciding on these objectives, the Trustees took into account the Charity Commission's guidance 'Public Benefit: Running a Charity'.



## Achievements and performance

### Summary of key activities in 2024-25

#### 1. Preventive activities

This year saw the first year of the Advancing Clergy Reflection (ACR) Programme, in partnership with The Henry Smith Charity. It has got off to a flying start in the very capable hands of our Programme Manager, Jacqueline Ede, appointed in April 2024. More details follow below.

Our aim is that our national programme of pastoral supervision and reflective practice groups will build the evidence base for its benefits and provide the momentum for this to become mandatory for clergy.

The 'Footsteps' programme of pastoral supervision for British Army chaplains continued throughout 2024-25. The evaluation of the programme will be completed later in 2025.

Curates from three dioceses participated in two-day Mental Health First Aid workshops, while ordinands in training at three theological colleges participated in half-day resilience training workshops.

An innovation this year has been the establishment of an online monthly reflective practice group for chaplains to the Gypsy, Roma and Traveller Communities (GRTC). This was requested by the Chair of the GRTC chaplains' group and the first session was held in March 2025.

#### 2. Restorative activities

St Luke's wishes to help every member of the clergy who turns to the charity at a time of psychological ill-health.

The number of people approaching St Luke's in 2024-25 for urgent psychological or psychiatric help was 128, the same as the number seen in 2022-23, after seemingly peaking in 2023-24 at 163 individuals.

We are hoping that the sharp increases seen in recent years in the number of clergy turning to St Luke's in psychological distress are now in the past.

#### 3. Advocacy activities

During the year, the strategic direction of the charity shifted towards prioritising evidence-based advocacy as a key aim of St Luke's (see below for more information). Preparations were also underway for the St Luke's Clergy Wellbeing Conference to be held in Birmingham in September 2025, bringing together representatives of dioceses across England, Wales, Scotland and Ireland, and marking the first five years of the Covenant for Clergy Care and Wellbeing.

# St Luke's

for clergy wellbeing

In summary, our achievements in 2024-25 demonstrate our commitment to both directly addressing, and advocating for, the need for positive clergy wellbeing. Through our three strands of work, the charity plays a vital role in underpinning the wellbeing of clergy and thereby assisting in mission and growth in the Church, with the resulting benefits to congregations and the wider community.

## Fundraising

A key objective for 2024-25 was to increase our fundraising income to ensure that St Luke's could continue to respond to requests for psychological assessments and treatment from clergy and their families. We were helped in this aim by a generous grant for £100,000 from the Archbishops' Council, which is directly enabling our review of restorative provision of psychological health care in our changing landscape, to ensure that we focus our help where it will make the most difference to clergy.

A highly enjoyable concert and supper was held at the Temple Church in May 2024, with the New London Orchestra led by Ronald Corp OBE. This raised £18,000. We were very sad indeed to learn of the death of Mr Corp in May 2025.



We were grateful to again receive significant grants from the Benefact Trust and the Pershore, Nashdom and Elmore Trust. The restricted grant from the Benefact Trust is enabling a variety of activities, with an emphasis on clergy wellbeing initiatives in dioceses.

Our fundraising team has initiated new fundraising campaigns in 2024-25. A programme of Wellbeing Walks based around church congregations began with one in Weston, Hertfordshire and one in Eastbourne on the same day in February 2025. Both were enjoyed and appreciated by participants as well as raising valuable funds for St Luke's.

A new initiative aimed at parishes – the Hundred Campaign – is seeking annual gifts of £100 from a target of 100 parishes, to enable 100 hours of one-to-one support and treatment for our individual beneficiaries.

St Luke's had three swimmers in the 'Swim Serpentine' challenge event, who between them raised over £2,000.

## St Luke's for clergy wellbeing



The St Luke's team supporting swimmers in the Swim Serpentine event, September 2024

Overall, we increased our income substantially compared with the previous year. The increase in our income was greatly assisted by the restricted income for the ACR Programme from The Henry Smith Charity, the generous grant from the Archbishops' Council, and the legacies, donations and sponsorship we received from our supporters.

As a result of the increase in income, the charity ended the year with an operational surplus of £124,000 compared with a deficit of £115,000 the previous year. Whilst this is a very positive picture it also includes a growing underspend on restricted funds £164,000 (2024: £58,000). We therefore end the year in a stronger financial position but with more to do ensure sustainability.

We are indebted to all our donors for their generosity in supporting our work.

### Review of preventive, restorative and advocacy activities

#### Preventive – our proactive work with clergy to help them flourish in their ministry

St Luke's develops and promotes preventive approaches to improve clergy wellbeing and mental health throughout their ministry. We encourage greater awareness of the emotional and psychological demands of ministry and the increasing pressure on clergy. To help address the challenges of ministry, St Luke's advocates for regular individual pastoral supervision, or reflective practice within a group, to be standard practice for clergy.

The charity has also developed a range of workshops, designed to help meet the specific challenges faced by clergy. These are set out on our website [Wellbeing menu - St Luke's \(stlukesforclergy.org.uk\)](https://stlukesforclergy.org.uk) and are available to clergy via their dioceses.

#### St Luke's Advancing Clergy Reflection (ACR) Programme

St Luke's would like to see it become 'the norm' for clergy to undertake regular pastoral supervision or reflective practice, which is mandatory in many other caring professions and in other denominations. Through this, clergy can share the emotional and psychological burdens of ministry, enabling them to flourish in their ministerial career.

In 2024 we were delighted to be awarded almost £2 million over five years by The Henry Smith Charity to support a five-year evaluated programme of pastoral supervision and reflective practice. The ACR Programme has a target of 650 clergy from 25 dioceses participating over the five years of the programme, together with training 107 new pastoral supervisors and reflective practice group facilitators, to grow the number of qualified practitioners needed to make these services available to clergy across England and Wales.

## St Luke's

for clergy wellbeing

Dioceses are chosen to participate based on geographical spread and factors such as a low level of pastoral supervision currently in the area and the likelihood that the diocese would struggle to finance pastoral supervision for their clergy themselves. Our wish is that all dioceses participating will take pastoral supervision forward after the programme ends and that the ACR Programme acts as a springboard for their own future delivery.

The main achievements during the first year have been:

- Signing of MOUs with seven dioceses of the Church of England plus the Church in Wales
- Establishing a Steering Group for the Programme, composed of stakeholders, academics, representatives of pastoral supervisors and users of pastoral supervision. Meetings are being held six-monthly, alternately in person and online
- Recruiting a pool of 56 qualified pastoral supervisors
- Training of the first 12 new pastoral supervisors, with a further 21 starting autumn 2025
- Getting the evaluation process underway, led by Dr Sharon Jagger of York St John University and Dr Alex Fry of Bournemouth University
- Establishing a Community of Practice of pastoral supervisors, trainers and reflective practice group facilitators. First online Masterclasses, entitled 'Working with Autistic Clergy' held and attended by 38 people across two sessions
- Holding the first six-monthly St Luke's pastoral supervisor online 'check-in' session
- Developing communication materials for the ACR Programme including the St Luke's Prayer Card
- Gaining the support of 10 Anglican religious communities committed to regular intercessions for the Programme.



Training new pastoral supervisors for the Church in Wales, February 2025

By combining the generous support of The Henry Smith Charity and the expertise of St Luke's for Clergy Wellbeing, the aim is to change the culture of the Church of England and Church in Wales to embrace regular pastoral supervision and reflective practice for clergy at all stages of their ministry.

Income and expenditure for this programme are shown under Restricted Funds in the Annual Accounts.

### Footsteps pastoral supervision programme for British Army chaplains

Following a pilot project, the British Army invited St Luke's to run a three-year national programme of pastoral supervision, named 'Footsteps'. Since 2023, 38 chaplains have been

## St Luke's

for clergy wellbeing

accessing up to eight one-to-one sessions per year with their experienced pastoral supervisors. The programme is being independently evaluated. Income and expenditure for this project are shown under Restricted Funds in the Annual Accounts.

### Mental Health First Aid training for curates

Curates in three dioceses – Carlisle, Leicester and Newcastle – participated in two-day Mental Health First Aid (MHFA) workshops. The workshops in Carlisle and Leicester were funded by the Benefact Trust, while the workshop in Newcastle was funded through donations made at the fundraising event at Lambeth Palace in a prior year.

Through the training, curates develop the skills to recognise when a person is experiencing poor mental health, and the confidence to listen and engage with the person. They also learn signposting them to appropriate support. St Luke's believes that there is a compelling need for curates to gain these skills early in their ministry so that they can better recognise and support people they encounter.

This course continues to be provided by the Humantalk team, who are familiar with the Church and contextualise the training to reflect the settings in which curates work. All the sessions to date have received exceptionally positive reviews from the participating curates.

Income and expenditure on the grant from the Benefact Trust are shown under Restricted Funds in the Annual Accounts.

'This was a fantastic training experience. It was sensitive and well led. The content was thorough and helpful, focusing on both the first aider and the people they would seek to assist – and not diagnose or go too far. Ben had a fantastic manner and very quickly developed a rapport, the way he made the course accessible and applicable for clergy was also superb and made the training feel bespoke to the group. Thank you'

'Brilliant, informative and thought-provoking course. Realisation that there is plenty more to learn and be aware of, but now given the resources to find out and signpost'

'It has been a thoroughly engaging and insightful course, one that will undoubtedly help me in my ministry and my life moving forward. I will definitely want to encourage those on the pastoral team to attend such a course as I believe it is essential'

### Wellbeing and resilience workshops for ordinands in training colleges

During 2024-25, workshops were held for ordinands in three theological education institutions (Trinity College Bristol, Ripon College Cuddesdon, Oxford and Oak Hill College, London), facilitated by experienced trainer Nicola Willcocks. Tailored to the needs of the ordinands, each session garnered excellent feedback from the participants.

## St Luke's for clergy wellbeing



Resilience training workshop at Trinity College, Bristol, May 2024

### Reflective practice groups

Reflective practice groups (RPGs) are regular, confidential sessions with a professional facilitator. They run for two years with a small, committed group of clergy. St Luke's has been instrumental in helping dioceses to set up and run RPGs over many years.

With funding from the Benefact Trust, in 2024-25 we started an online, professionally facilitated RPG for chaplains to the Gypsy, Roma and Traveller Communities (GRTC). This will run monthly for two years, and it includes clergy from across the country and across denominations.

St Luke's was approached by the Chair of the GRTC Chaplains Group because some chaplains experience misunderstanding and discrimination from both their clerical peers and their parishioners. They can feel isolated and under-supported, which can adversely affect their wellbeing.

*"Through our work, we have encountered various forms of hate and ingrained negative stereotypes against the communities, stemming from a lack of cultural awareness and understanding. We are here to help churches build bridges with the communities and support positive engagements within their neighbourhoods". Chair - Gypsy, Roma & Traveller Friendly Churches*

Evaluation of this initiative will cover themes including the experience of supporting Gypsy, Roma and Traveller Communities, the impact of online reflective groups for chaplains, and will develop the evidence base for group pastoral supervision in specialist areas of ministry.

We are also pleased to be part of a wellbeing initiative of the Clergy Support Trust: <https://www.clergysupport.org.uk/wellbeing-workshop-reflective-practice-groups>. St Luke's offers its expertise in establishing RPGs to any diocese that chooses to use its annual 'credits' from the Clergy Support Trust in this way. More information can be obtained from the St Luke's Wellbeing Programme Manager.

### **Restorative – psychological health care for members of the clergy and their families**

During the year ended 31 March 2025, 128 members of the clergy or their immediate families were referred for one-to-one consultations, diagnosis and/or treatment for psychological ill-health. They came from 31 dioceses of the Church of England, plus the Church in Wales and the Scottish Episcopal Church.

## St Luke's

for clergy wellbeing

This aspect of our work was helped immensely by the award of a grant of £100,000 by the Archbishops' Council in July 2024. St Luke's is hugely grateful to the Council for this generous support. Without it, responding to requests for individual assessments and treatment was reducing our reserves and jeopardising the future viability of the charity.

This grant, which we hope will continue, has achieved its objective of enabling St Luke's to respond positively to all requests for psychological assistance for clergy and their family members in 2024-25.

Examples of feedback from patients are shown below:

'May I take this opportunity to thank you for all your kind help and efficient assistance over recent years, which I have greatly appreciated, and without which I would certainly not still be capable of carrying out my ministry'

'Again, thank you to St Luke's for this valuable service - it's going to change my life. After 45 years I finally understand why I struggle with certain things'

'I want to emphasise again how very grateful I am to the Trustees for their generosity. The counselling has helped me out of a crisis and to look more positively at the future'

### Advocacy – building evidence and sharing learning on clergy wellbeing

During the year, the strategic direction of the charity shifted towards prioritising evidence-based advocacy as a primary aim of St Luke's. This arose during meetings of the Trustees' Strategy Group, which made recommendations for discussion at an Awayday for the Board and staff in October 2024. This highlighted an enhanced role for St Luke's in evidence-based advocacy for clergy wellbeing.

By 'advocacy' we mean generating evidence through pilot schemes, advocating for them and promoting wider take-up and implementation by the Church. Or taking results of other organisations or dioceses' clergy wellbeing activities and sharing and promoting them.

The independence of St Luke's from the Church is crucial to its activities and its ability to influence. With many dioceses and organisations now working on clergy wellbeing, it is important to avoid duplication and to be distinctive. Our national conference in September 2025 will bring together and integrate our work with findings from other trusted sources, for the benefit of clergy wellbeing.

### Summary of charitable activities

The charity's role is defined as 'an independent charity that works with trusted partners to advocate for good practice and seeks to serve clergy through offering targeted psychological interventions, which in turn enriches our advocacy work on behalf of serving clergy'.

St Luke's promotes a culture across the Church that recognises that clergy wellbeing is key to ministry and mission. The increasing advocacy role recently identified as a priority for St Luke's is consistent with this aim.

## St Luke's

for clergy wellbeing

St Luke's endorses the Covenant for Clergy Care and Wellbeing, which was made an Act of Synod in 2020. Many of the preventive initiatives devised by St Luke's aim to address clergy wellbeing needs highlighted in the Covenant.

Arguably there has never been a more challenging time for clergy in the Church of England. The context in which we are seeking to support and resource clergy is one in which there is anxiety about the survival of the Church combined with a breakdown of trust, particularly in relation to safeguarding issues. Reducing parish and diocesan finances mean that clergy need to work harder, for example by serving more parishes.

We seek to grow our preventive, restorative and advocacy activities in response to evolving need. Our expertise in developing and delivering clergy wellbeing initiatives enables the charity to maximise the benefits achieved through its finite financial resources.

Our work is entirely made possible by our supporters and funders, to whom we express our heartfelt thanks.

### Beneficiary relations

We seek feedback from individual beneficiaries of our one-to-one restorative services and from participants in preventive activities to enhance wellbeing. We use the feedback received to help us to improve our services and expand our offerings to meet the evolving needs of clergy. In addition, every year we are grateful to receive a huge number of unsolicited letters, phone calls and emails of thanks.

### Reach and awareness

The clergy wellbeing initiatives undertaken by St Luke's increase the opportunities for clergy to enhance their psychological wellbeing, manage the expectations of others and build resilience, to underpin a lifelong, fulfilling ministry that benefits their congregations and the wider community.

Over its lifetime the ACR Programme described above will reach 25 dioceses – more than half of the Church of England – and every diocese of the Church in Wales. By working with dioceses to establish pastoral supervision for clergy and evaluating its impact, we are building the evidence base for what works in supporting clergy in their ministry.

The charity's three strands of work – preventive, restorative and advocacy – are interconnected. We respond to requests from clergy in need of psychological care and this informs us of the need for interventions and activities that will help clergy to have a long and fulfilling ministry, despite the challenges they face.

### Future plans

The Trustees remain committed to ensuring the long-term sustainability of St Luke's for Clergy Wellbeing. Following a year of significant programme delivery and growth in income, the charity ended the financial year with an operational surplus of £124,000, compared with a deficit of £115,000 the previous year. This improvement was supported by generous grants, from The Henry Smith Foundation and the Archbishops' Council, and a range of successful fundraising initiatives.

# St Luke's

for clergy wellbeing

While this marks a welcome step forward, the Trustees recognise that financial sustainability requires careful stewardship of both unrestricted and restricted funds. A growing underspend on restricted income (£164,000 in 2024–25 compared with £58,000 in 2023–24) highlights the importance of aligning programme delivery with available resources. To address this, the charity is actively engaged with The Henry Smith Foundation to review and reforecast the Advancing Clergy Reflection Programme, drawing on learning from the first 18 months of delivery.

In parallel, the Trustees have agreed a programme of work to ensure the sustainability of restorative services. This includes reviewing the provision of psychological health care to ensure support is targeted where it will have the greatest impact, and that future delivery remains financially viable.

The retirement of Claire Walker as Chief Executive in June 2025, after ten years of dedicated service, marked the end of a significant chapter in the charity's development. Her leadership helped shape St Luke's into the organisation it is today, and the Trustees are deeply grateful for her contribution.

The appointment of Tim Ling as Chief Executive signals the beginning of a new phase for the charity. With a strong background in theological education, advocacy and strategic leadership, Tim brings a deep understanding of clergy wellbeing and a commitment to building on the charity's strengths while responding to emerging needs. Looking ahead, the Trustees have identified four strategic priorities for 2025–26:

**Advocacy:** Expand our evidence-based advocacy work to raise the profile of clergy wellbeing and convene key stakeholders to share learning and promote best practice.

**Preventive:** Build on the early success of the Advancing Clergy Reflection (ACR) Programme, increasing diocesan participation and access to pastoral supervision.

**Restorative:** Deliver the agreed programme of work to ensure the sustainability and impact of psychological health care provision.

**Fundraising:** Strengthen relationships with donors and funding partners to secure the resources needed to sustain and grow our work.

With renewed leadership, a committed Board, and a dedicated staff team, St Luke's is well placed to continue making a meaningful difference to clergy wellbeing and, through them, to the communities they serve.

## Financial Review

Income this year amounted to £621,015 (2024: £286,951). Direct charitable expenditure was £500,584, an increase of 13% (£2024: 402,274).

There was an operational surplus of £120,431 compared with a deficit of £115,000 the previous year, a surplus made possible by a significant underspend in restricted funding which has risen from £58,000 in 2024 to £164,000. While the underlying deficit has reduced significantly, the aim will be to eliminate this and move the charity into surplus.

# St Luke's

for clergy wellbeing

The value of the portfolio at the end of the financial year was £791,723 (2024: £693,417; 2023: £813,033) and was largely due to additions to the fund following the drawdown of £130,000 in 2024 to meet operational needs.

## Investments and investment policy

The charity's investment objective is to maximise the total return of the portfolio over the longer term using a balance of capital growth and income with a prudent level of risk and liquidity. A relatively low risk profile was adopted for the portfolio in 2022-23, which continued in 2024-25.

The Trustees wish to ensure that the charity's investments support a positive environmental or social impact as well as achieving the financial returns needed for its charitable activities. The Trustees' policy is therefore only to appoint managers that are signatories to the Principles for Responsible Investment developed by the United Nations (UNPRI). Brewin Dolphin is a UNPRI signatory.

The Trustees receive quarterly reports from Brewin Dolphin, which are discussed in detail by the Finance Committee on behalf of the Board.

## Reserves policy

The charity's reserves policy is to ensure that the objective of supporting the wellbeing of the clergy in the long term is achieved. In recent years St Luke's has faced challenges in raising sufficient funds year-on-year. In order to maintain our charitable activities and meet the charity's operational costs, St Luke's intends to maintain a significant level of reserves, equivalent to a minimum of six months' expenditure.

## Risk management

The charity maintains a comprehensive Risk Register, covering the actions necessary to mitigate the identified risks. This is reviewed in detail annually by the Trustees and any risks identified between reviews are added. The charity has a Charity and Community Insurance policy with Ecclesiastical Insurance, which includes cover for Trustees' liability.

## Review of policies

The Trustees maintain a schedule of all policies relevant to the charity's activities, including an Employee Handbook. These are reviewed on an agreed frequency, taking external professional advice as appropriate.



## Trustees' Report

### Structure, governance and management

#### Governing document

Established in 1892, St Luke's has a long history of supporting the health and wellbeing of Anglican clergy. The charity continues to develop its activities to meet the evolving needs of its beneficiaries. The charity is placing greater emphasis on preventive approaches, to improve mental health and wellbeing and help clergy to address the challenges of ministry.

St Luke's Healthcare for the Clergy is a company limited by guarantee, as defined by the Companies Act 2006, with exclusively charitable objects, and is governed by its Memorandum & Articles of Association adopted on 21 February 2008 and amended on 18 June 2008, 30 October 2009 and 18 November 2019.

#### Governance and management

The Directors (who are the Trustees of the charity) are responsible for the overall governance of the charity. They aim to maintain a balance on the Board between clerical members, clinical members and others with specific skills. The Board meets three times a year to review income and expenditure, strategy and performance and to agree plans and budgets. A Governance Framework is reviewed at each Board meeting to ensure that governance remains on track. The Board delegates day-to-day management to the Chief Executive.

St Luke's is based in a rented office in Church House, Westminster. At the end of 2024-25 it employed six paid staff, all of whom worked part-time. They were Chief Executive Claire Walker, Director of Philanthropy Tess Thorpe, Director of Wellbeing Jacqueline Ede, Supporter Engagement Manager Lucy McDonald, Medical Secretary Dawn Lewis and Wellbeing Programme Manager Shannon O'Dam. The charity was assisted by two office volunteers in 2024-25, both of whom have gone on to paid employment.

Processes are in place to ensure that timely, appropriate management information is prepared, so that expenditure, performance and progress can be monitored by the Board. The systems of internal control are designed to provide reasonable assurance against material misstatement or loss. They include:

- an annual budget approved by the Board;
- regular consideration by the Trustees of financial results, variance from budget and non-financial performance;
- identification and management of risks.

The Finance Committee is a formal sub-committee of the Board and meets every four months. It is composed of three Trustees plus the Chief Executive. In 2024-25 it also extended invitations to one 'Trustee observer' per meeting, so that members of the wider Board could engage more closely in financial issues and contribute their expertise gained in other spheres.



### **Trustee recruitment and induction**

At the year end, the Trustee body consisted of nine people, of whom five are ordained, three are women, three have specific clinical expertise and four have a range of legal, business and finance-related expertise. Upon appointment, new Trustees are given an induction by the Chairman and the Chief Executive as well as background information on the charity, including the Memorandum & Articles of Association, recent Annual Reports and Accounts and Minutes of Board meetings.

The three Trustees who retired during the year were our Chairman of 12 years, Edward Martineau, together with Jan Korris and John Nugée. Each had given many years of exemplary service to St Luke's. The Trustees express their profound gratitude for their extraordinary commitment to St Luke's, which has seen transformation in its activities under their leadership.

### **Remuneration policy**

Remuneration of key personnel is disclosed in note 10 to the financial statements. All Trustees give their time related to their roles as Trustees freely. The charity's Memorandum and Articles of Association enable Directors (Trustees) to be paid for specific services. No Trustee received remuneration in last year.

St Luke's uses the services of the mental wellbeing company Cognacity to provide restorative psychological diagnosis and treatment services for its beneficiaries at a concessionary rate that just covers the company's costs in providing those services. One of the Trustees, Gary Bell, is a Director of Cognacity and receives no personal benefit from this arrangement.

To ensure transparency and uphold best practice in governance, St Luke's has robust procedures in place for managing potential conflicts of interest. All Trustees are required to declare any conflicts at the start of each Board meeting, and these declarations are formally recorded. In addition, Gary Bell is not a member of the Trustee working group currently reviewing the charity's restorative care provision, thereby ensuring that decisions in this area are made independently and without influence from any related party.

Trustees' expenses are shown in note 11 to the financial statements and the arrangement with Cognacity is shown in note 19, Related Party Transactions.

### **Public benefit**

The Trustees confirm that they have complied with their duty under section 17 of the Charities Act 2011. They have considered the public benefit guidance published by the Charity Commission and have followed it. In supporting the psychological health needs of the clergy, their spouses and children up to the age of 18, St Luke's enables clergy to serve their congregations and wider community more effectively. As well as supporting individual clergy, St Luke's takes a preventive approach, enabling clergy and dioceses to address wellbeing through appropriate strategies and input of expertise and training.

# St Luke's

for clergy wellbeing

## Going concern

The Trustees have a reasonable expectation that the charity has adequate resources to continue operational existence for the foreseeable future. For this reason, the Trustees continue to adopt the going concern basis of accounting in preparing the annual financial statements.

This report, incorporating the Chairman's Report and the Strategic Report, was approved by the Trustees in their capacity as company directors on 21 November 2025 and signed on their behalf by:



**The Revd Canon Stephen Fielding**  
Chairman

21<sup>st</sup> November 2025



### **Statement of Directors' responsibilities**

The Directors (who are also Trustees of St Luke's Healthcare for the Clergy for the purposes of charity law) are responsible for preparing the Annual Report of the Company and the financial statements in accordance with applicable law and United Kingdom Generally Accepted Accounting Practice.

Company law requires the Directors to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the Charitable Company and of the incoming resources and application of resources, including the income and expenditure, of the Charitable Company for that period. In preparing those financial statements, the Directors are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charitable Company will continue in business.

The Directors are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the Charitable Company and to enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the Charitable Company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Registered office  
Room 103  
Church House  
27 Great Smith Street  
London  
SW1P 3AZ

Signed on behalf of the Trustees

**The Revd Canon Stephen Fielding**  
Chairman

21<sup>st</sup> November 2025



## Independent Examiner's Report

### Independent examiner's report to the Trustees of St Luke's Healthcare for the Clergy ('the company')

I report to the charity Trustees on my examination of the accounts of the company for the year ended 31 March 2025. This report is made solely to the company's Trustees, as a body, in accordance with Part 4 of the Charities (Accounts and Reports) Regulations 2008. My work has been undertaken so that I might state to the company's Trustees those matters I am required to state to them in an independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the company and the company's Trustees as a body, for my work or for this report.

### Responsibilities and basis of report

As the Trustees of the company (and its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the company's accounts carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

### Independent examiner's statement

I have completed my examination. I can confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. Accounting records were not kept in respect of the company as required by section 386 of the 2006 Act; or
2. The accounts do not accord with those records; or
3. The accounts do not comply with the accounting requirement of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair view which is not a matter considered as part of an independent examination; or
4. The accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities (applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland [FRS 102]).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

Signed:

Janice Matthews FCA

Menzies LLP, Chartered Accountants  
2<sup>nd</sup> Floor, Magna House, London Road  
Staines-upon-Thames TW18 4BP

DocuSigned by:

*Janice Matthews*  
634F24DE92A4471...

Dated: 05-Dec-2025

# St Luke's

for clergy wellbeing

## Statement of Financial Activities for the year ended 31 March 2025 (incorporating income and expenditure account)

	Note	Restricted funds 2025 £	Unrestricted funds 2025 £	Total funds 2025 £	Total funds 2024 £
<b>Income from:</b>					
Donations and legacies:	2				
Grants		448,946	-	448,946	140,860
Other donations and legacies		-	119,737	119,737	100,337
Charitable activities	3	-	27,407	27,407	20,533
Investments	4	-	24,925	24,925	25,221
<b>Total income</b>		<b>448,946</b>	<b>172,069</b>	<b>621,015</b>	<b>286,951</b>
<b>Expenditure on:</b>					
Raising funds:	5,6				
Voluntary income		-	50,987	50,987	35,940
Investment management		-	5,327	5,327	5,474
Charitable activities	7	343,011	101,259	444,270	360,860
<b>Total expenditure</b>		<b>343,011</b>	<b>157,573</b>	<b>500,584</b>	<b>402,274</b>
<b>Net movement in funds before other recognised gains/(losses)</b>		<b>105,935</b>	<b>14,496</b>	<b>120,431</b>	<b>(115,323)</b>
<b>Other recognised gains/(losses):</b>					
Gains on revaluation of fixed assets		-	3,632	3,632	15,857
<b>Net movement in funds</b>		<b>105,935</b>	<b>18,128</b>	<b>124,063</b>	<b>(99,466)</b>
<b>Reconciliation of funds:</b>					
Total funds brought forward		58,458	678,895	737,353	836,819
Net movement in funds		105,935	18,128	124,063	(99,466)
<b>Total funds carried forward</b>		<b>164,393</b>	<b>697,023</b>	<b>861,416</b>	<b>737,353</b>

The notes on pages 25 to 35 form part of these financial statements.

The Statement of Financial Activities includes all gains and losses recognised in the year.



## Balance Sheet at 31 March 2025

	Note	2025 £	2024 £
<b>Fixed assets</b>			
Tangible assets	12	1,527	77
Investments	13	791,723	693,417
		<b>793,250</b>	<b>693,494</b>
<b>Current assets</b>			
Debtors	14	16,395	15,286
Cash at bank and in hand		84,349	59,330
		<b>100,744</b>	<b>74,616</b>
<b>Current liabilities</b>			
Creditors: amounts falling due within one year	15	(32,578)	(30,757)
<b>Net current assets</b>		<b>68,166</b>	<b>43,859</b>
<b>Total assets less current liabilities</b>		<b>861,416</b>	<b>737,353</b>
<b>Total net assets</b>		<b>861,416</b>	<b>737,353</b>
<b>Charity funds</b>			
Restricted funds	16	164,393	58,458
Unrestricted funds	16	697,023	678,895
<b>Total funds</b>		<b>861,416</b>	<b>737,353</b>

The notes on pages 25 to 35 form part of these financial statements.

The Company's financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime. The Trustees consider that the Company is entitled to exemption from the requirement to have an audit under the provisions of section 477 of the Companies Act 2006 ('the Act') and the members have not required the Company to obtain an audit for the year in question in accordance with section 476 of the Act.

The Trustees acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

Approved by the Trustees on 21<sup>st</sup> November 2025 and signed on their behalf by:

**The Revd Canon Stephen Fielding**  
Chairman

21<sup>st</sup> November 2025



## Notes to the Financial Statements for the year ended 31 March 2025

### 1. Accounting policies

#### 1.1 Basis of preparation of financial statements

The financial statements have been prepared in accordance with the Charities SORP (FRS 102) Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

St Luke's Healthcare for the Clergy meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy.

St Luke's Healthcare for the Clergy ('St Luke's') is a charitable company limited by guarantee incorporated in England and Wales. The address of the registered office is shown in the Reference and Administrative Details section.

#### 1.2 Going concern

The charity has a received multiyear grant from the Henry Smith Foundation, along with a large grant from the Archbishops' Council as part of its continuing efforts to diversify income streams. This work has stabilised reserves and provides a foundation for long term sustainability. The trustees believe that the charity has strengthened its position from last year and that the going concern basis of preparation of the accounts continues to be appropriate.

#### 1.3 Income

All income is recognised once the Company has entitlement to the income, it is probable that the income will be received and the amount of income receivable can be measured reliably.

The recognition of income from legacies is dependent on establishing entitlement, the probability of receipt and the ability to estimate with sufficient accuracy the amount receivable. Evidence of entitlement to a legacy exists when the Company has sufficient evidence that a gift has been left to them (through knowledge of the existence of a valid will and the death of the benefactor) and the executor is satisfied that the property in question will not be required to satisfy claims in the estate. Receipt of a legacy must be recognised when it is probable that it will be received and the fair value of the amount receivable, which will generally be the expected cash amount to be distributed to the Company, can be reliably measured.

Income tax recoverable in relation to investment income is recognised at the time the investment income is receivable.



Notes to the Financial Statements for the year ended 31 March 2025

1.4 Expenditure

Liabilities are recognised as resources expended where there is a legal or constructive obligation committing the charity to the expenditure. All expenditure is accounted for on an accruals basis and includes value added tax, which is irrecoverable.

Fundraising costs comprise investment management fees, fundraising activities and relevant staff salaries, namely the majority of the Director of Philanthropy's salary and a proportion of the Chief Executive's salary.

Expenditure on charitable activities reflects the charity's strategic areas of restorative, preventive and advocacy. Charitable activities include directly attributable staff salaries, namely the Medical Secretary, the Wellbeing Programme Manager and a proportion of the Chief Executive's salary.

Support costs are those costs incurred directly in support of expenditure on the objects of the charity and comprise an allocation of the charity's running costs (office rental, IT and website, bookkeeping fees, insurance etc) according to the proportion of expenditure on its three areas of charitable activities. Governance costs include a historic monthly payment to a former employee, agreed by a previous Board of Trustees.

1.5 Tangible fixed assets and depreciation

Tangible fixed assets costing £nil or more are capitalised and recognised when future economic benefits are probable and the cost or value of the asset can be measured reliably.

Tangible fixed assets are initially recognised at cost. After recognition, under the cost model, tangible fixed assets are measured at cost less accumulated depreciation and any accumulated impairment losses. All costs incurred to bring a tangible fixed asset into its intended working condition should be included in the measurement of cost.

Depreciation is charged so as to allocate the cost of tangible fixed assets less their residual value over their estimated useful lives.

Depreciation is provided on the following bases:

Short term leasehold property	Nil
Plant and machinery	33% straight line
Computer equipment	One year

1.6 Investments

Fixed asset investments are a form of financial instrument and are initially recognised at their transaction cost and subsequently measured at fair value at the Balance sheet date, unless the value cannot be measured reliably in which case it is measured at cost less impairment. Investment gains and losses, whether realised or unrealised, are combined and presented as 'Gains/(Losses) on investments' in the Statement of financial activities.



## Notes to the Financial Statements for the year ended 31 March 2025

### 1.7 Fund accounting

The general fund is composed of unrestricted donations or legacies available for use at the discretion of the trustees in furtherance of the charity's objects. Restricted funds are grants, donations or legacies to be used for specific purposes as set out by the donor or which have been raised by the charity for specific purposes.

### 2. Income from donations and legacies

	Restricted funds 2025	Unrestricted funds 2025	Total funds 2025	Total funds 2024
	£	£	£	£
Donations	-	81,959	81,959	87,195
Legacies	-	37,778	37,778	13,142
Grants	448,946	-	448,946	140,860
	<u>448,946</u>	<u>119,737</u>	<u>568,683</u>	<u>241,197</u>
<i>Total 2024</i>				
	<u>140,860</u>	<u>100,337</u>	<u>241,197</u>	

The restricted funds referred to in the accounts relate to grants received from the Archbishops' Council, the Benefact Trust, the British Army, Hymns Ancient and Modern, and the Henry Smith Foundation. Restricted funds totally £343,011 were spent during the year.

### 3. Income from charitable activities

	Unrestricted funds 2025	Total funds 2025	Total funds 2024
	£	£	£
Preventive health services	12,325	12,325	20,533
Fundraising sales	15,082	15,082	-
	<u>27,407</u>	<u>27,407</u>	<u>20,533</u>
<i>Total 2024</i>			
	<u>20,533</u>	<u>20,533</u>	



## Notes to the Financial Statements for the year ended 31 March 2025

### 4. Investment income

	Unrestricted funds 2025	Total funds 2025	Total funds 2024
	£	£	£
Income from listed investments	24,858	24,858	25,194
Interest received	67	67	27
	<u>24,925</u>	<u>24,925</u>	<u>25,221</u>
<i>Total 2024</i>	<u>25,221</u>	<u>25,221</u>	

### 5. Expenditure on raising funds

#### Costs of raising voluntary income

	Unrestricted funds 2025	Total funds 2025	Total funds 2024
	£	£	£
Cost of raising funds	13,902	13,902	1,239
Fundraising staff costs	37,085	37,085	34,701
	<u>50,987</u>	<u>50,987</u>	<u>35,940</u>
<i>Total 2024</i>	<u>35,940</u>	<u>35,940</u>	

### 6. Investment management costs

	Unrestricted funds 2025	Total funds 2025	Total funds 2024
	£	£	£
Investment management fees	<u>5,327</u>	<u>5,327</u>	<u>5,474</u>
<i>Total 2024</i>	<u>5,474</u>	<u>5,474</u>	

## Notes to the Financial Statements for the year ended 31 March 2025

### 7. Analysis of expenditure on charitable activities

#### Summary by fund type

	Restricted funds 2025	Unrestricted funds 2025	Total 2025	Total 2024
	£	£	£	£
Preventive	187,261	27,867	<b>215,128</b>	102,774
Restorative	124,126	15,095	<b>139,221</b>	192,590
Advocacy	31,624	17,118	<b>48,742</b>	29,169
Governance Costs	-	41,179	<b>41,179</b>	36,327
	<u>343,011</u>	<u>101,259</u>	<u><b>444,270</b></u>	<u>360,860</u>
<i>Total 2024</i>				
	<u>97,207</u>	<u>263,653</u>	<u>360,860</u>	

### 8. Analysis of expenditure by activities

	Activities undertaken directly 2025	Support costs 2025	Total funds 2025	Total funds 2024
	£	£	£	£
Preventive	196,254	18,874	<b>215,128</b>	102,774
Restorative	115,629	23,592	<b>139,221</b>	192,590
Advocacy	44,023	4,719	<b>48,742</b>	29,169
Governance Costs	-	41,179	<b>41,179</b>	36,327
	<u>355,906</u>	<u>88,364</u>	<u><b>444,270</b></u>	<u>360,860</u>
<i>Total 2024</i>				
	<u>278,740</u>	<u>82,120</u>	<u>360,860</u>	



## Notes to the Financial Statements for the year ended 31 March 2025

### 8. Analysis of expenditure by activities (continued)

#### Analysis of support costs

	Preventive 2025	Restorative 2025	Advocacy 2025	Governance Costs 2025	Total funds 2025	Total funds 2024
	£	£	£	£	£	£
Premises costs	5,771	4,616	1,154	-	11,541	11,847
IT, database and website costs	6,354	5,083	1,271	-	12,708	9,741
Bookkeeping services	5,714	4,572	1,143	-	11,429	9,833
Other office costs	5,753	4,603	1,151	-	11,507	14,372
Governance staff costs	-	-	-	31,759	31,759	27,028
Other governance costs	-	-	-	9,420	9,420	9,299
<b>Total 2024</b>	<b>23,592</b>	<b>18,874</b>	<b>4,719</b>	<b>41,179</b>	<b>88,364</b>	<b>82,120</b>
	<b>35,554</b>	<b>6,849</b>	<b>3,390</b>	<b>36,327</b>	<b>82,120</b>	

### 9. Independent examiner's remuneration

	2025	2024
	£	£
Fees payable to the Company's independent examiner for the independent examination of the Company's annual accounts	<u>9,650</u>	<u>8,770</u>

## Notes to the Financial Statements for the year ended 31 March 2025

### 10. Staff costs

	2025	2024
	£	£
Wages and salaries	178,882	138,804
Social security costs	9,723	7,069
Contribution to defined contribution pension schemes	3,501	2,596
	<u>192,106</u>	<u>148,469</u>

The charity complies with statutory requirements regarding workplace pensions and operates a defined contribution scheme through the People's Partnership.

The average number of persons employed (full-time equivalent) by the Company during the year was as follows:

2025	2024
No.	No.
<u>3.2</u>	<u>3</u>

The total number of staff employed over the year was 6, all of whom worked on a parttime basis. No employee received remuneration amounting to more than £60,000 in either year.

The remuneration of key management personnel was £81,370 (2024: £67,702). Key management personnel are the Chief Executive and two Directors, all work part-time.

### 11. Trustees' remuneration and expenses

During the year, no Trustee received payments for professional services (2024 - £225). No Trustees received any benefits in kind (2023 - nil). Three Trustees received reimbursement of travel and accommodation expenses for attendance at meetings amounting to £1,071 (2024 - five Trustees, £676). During the year, no Trustees received any remuneration or other benefits (2024 - £NIL-).

# St Luke's

for clergy wellbeing

## Notes to the Financial Statements for the year ended 31 March 2025

### 12. Tangible fixed assets

	Freehold property £	Plant and Machinery £	Computer equipment £	Total £
<b>Cost or valuation</b>				
At 1 April 2024	2	8,524	1,366	9,892
Additions	-	-	3,770	3,770
At 31 March 2025	2	8,524	5,136	13,662
<b>Depreciation</b>				
At 1 April 2024	-	8,489	1,326	9,815
Charge for the year	-	35	2,285	2,320
At 31 March 2025	-	8,524	3,611	12,135
<b>Net book value</b>				
At 31 March 2025	2	-	1,525	1,527
At 31 March 2024	2	35	40	77

### 13. Fixed asset investments

	Listed investments £
<b>Cost or valuation</b>	
At 1 April 2024	693,417
Additions	100,000
Revaluations	(1,694)
At 31 March 2025	791,723

The charity's investment portfolio is held and managed on a discretionary basis by Brewin Dolphin. The Trustees receive quarterly reports and review performance regularly through the Finance Committee, which monitors returns, risk levels, and alignment with the charity's investment objectives and ethical policy.



## Notes to the Financial Statements for the year ended 31 March 2025

### 14. Debtors

	2025	2024
	£	£
<b>Due within one year</b>		
Trade debtors	-	(200)
Other debtors	150	750
Prepayments and accrued income	16,245	14,736
	<u>16,395</u>	<u>15,286</u>

### 15. Creditors: Amounts falling due within one year

	2025	2024
	£	£
Trade creditors	1,167	726
Other creditors	1,314	557
Accruals and deferred income	30,097	29,474
	<u>32,578</u>	<u>30,757</u>



## Notes to the Financial Statements for the year ended 31 March 2025

### 16. Statement of funds

#### Statement of funds - current year

	Balance at 1 April 2024 £	Income £	Expenditure £	Gains/ (Losses) £	Balance at 31 March 2025 £
General Funds	678,895	172,069	(157,573)	3,632	697,023
Lambeth Palace Donations	2,506	-	(2,506)	-	-
Benefact	6,381	28,600	(28,600)	-	6,381
Henry Smith Charity	49,571	265,400	(156,959)	-	158,012
Archbishops' Council	-	100,000	(100,000)	-	-
British Army Grant	-	51,096	(51,096)	-	-
Temple	-	2,850	(2,850)	-	-
Hymns Ancient & Modern	-	1,000	(1,000)	-	-
	58,458	448,946	(343,011)	-	164,393
<b>Total of funds</b>	<b>737,353</b>	<b>621,015</b>	<b>(500,584)</b>	<b>3,632</b>	<b>861,416</b>

#### Statement of funds - prior year

	Balance at 1 April 2023 £	Income £	Expenditure £	Gains/ (Losses) £	Balance at 31 March 2024 £
General Funds - all funds	822,014	146,091	(305,067)	15,857	678,895
British Army Grant	6,055	50,635	(56,690)	-	-
Lambeth Palace Donations	8,750	-	(6,244)	-	2,506
Benefact	-	28,600	(22,219)	-	6,381
HA&M	-	1,000	(1,000)	-	-
Henry Smith Charity	-	60,625	(11,054)	-	49,571
	14,805	140,860	(97,207)	-	58,458



## Notes to the Financial Statements for the year ended 31 March 2025

### 17. Analysis of net assets between funds

#### Analysis of net assets between funds - current year

	Restricted funds 2025	Unrestricted funds 2025	Total funds 2025
	£	£	£
Tangible fixed assets	-	1,527	1,527
Fixed asset investments	-	791,723	791,723
Current assets	164,393	(63,649)	100,744
Creditors due within one year	-	(32,578)	(32,578)
<b>Total</b>			
	<u>164,393</u>	<u>697,023</u>	<u>861,416</u>

#### Analysis of net assets between funds - prior year

	Restricted funds 2024	Unrestricted funds 2024	Total funds 2024
	£	£	£
Tangible fixed assets	-	77	77
Fixed asset investments	-	693,417	693,417
Current assets	58,458	16,158	74,616
Creditors due within one year	-	(30,757)	(30,757)
<b>Total</b>			
	<u>58,458</u>	<u>678,895</u>	<u>737,353</u>

### 18. Other financial commitments

At the year end, funds of £48,770 (2024: £53,976) were committed to meet specific referral requests for investigation, diagnosis and treatment made by clergy and their families. If the funds committed are unused within a year they are written back.

### 19. Related party transactions

St Luke's uses the services of the mental wellbeing company Cognacity to provide restorative services for the charity's beneficiaries at a concessionary rate that does not cover the company's costs in providing these services. One of the Trustees, Dr Gary Bell, is a Director of Cognacity, but receives no personal benefit from this arrangement. The total cost of the services provided during the year was £89,155 (2024: £93,550). St Luke's has not entered into any other related party transaction during the year, nor are there any outstanding balances owing between related parties and the charity at 31 March 2025.