

PARISH OF MORRISTON
ST DAVID'S CHURCH
TRUSTEES REPORT
YEAR ENDED 31 DECEMBER 2024

Administrative information

The Parish is part of the Church in Wales in the former Deanery of Afon Tawe which is now known as the Ministry Area of Afon Tawe in the Diocese of Swansea and Brecon. The Church is registered with the Charity Commission. Its registered number is 1131686.

Its correspondence address is The Vicarage, 129 Clasemont Road, Morriston Swansea.

The dedication of the Church is St David's and is located on Woodfield Street, Morriston, Swansea.

Church council members

The Council members who have served in the period from 16 April 2023 to the date of this report are as follows:-

Incumbent	Canon HM Lervy resigned 11 th February 2024
Vicar's Warden	Mrs Margaret Jones
People's Warden	Mr Freddie Hollamby
Others	Mrs Mary Hollamby-acting secretary
	Mr Gwynfor Lewis – Treasurer
	Mrs LG Lewis
	Mr WK Lewis- safeguarding officer

Church Council members are appointed in accordance with the constitution of the Church in Wales and serve from the date of the annual meeting to the conclusion of the meeting for the following year. The parish meeting for 2023 was held on the 16 April 2023.

Objectives and activities

The promotion of the whole mission of the Church, pastoral, evangelical, social and ecumenical in the Parish.

Achievements and performance

	This year	Last year
Electoral Roll members	134	144
Easter communicants	129	128
Average attending members	94	98

Statement of Trustees Responsibilities

To comply with the Constitution of the Church in Wales and the rules and regulation of the Charity Acts.

Review of the Year

The proposals in the Diocese to change the method of allocation of Parish Share was brought into effect this year whereby each Ministry Area could decide its own apportionment from a global requirement imposed by the Diocese. This is causing some uncertainty as to the costs which will become payable in the future by individual Parishes or Churches. The council is therefore concerned to ensure the continuing maintenance of an appropriate level of reserves to support its work in the future. The Area Ministry sought during the year to have its apportionment reduced as the premise on which the original allocation was made was fundamentally flawed in that it assumed that there would be three full time stipendiary cleric in the Area, having already given notice that one would be leaving very early in the year and that a replacement was unlikely to be appointed very quickly. In the event the replacement was appointed some thirteen months after the vacancy occurred.

Financial review

The Church had a deficit in the year on General Account of £5805(2023-£1225). This deficit on general funds arose from reduction in direct giving and although largely offset by a reduced contribution to Parish Share, additional costs re heating, lighting and repairs augmented the deficit. Parish share was assessed at £64000 but as noted above was calculated on a false premise and although an appeal was made to correct this no support was forthcoming. The

Ministry Area had asked for a reduction of £45000 which it calculated was the effect of losing one cleric and the saving to this Church would have resulted in us being able to fulfil our obligation in full. In the event we underpaid our contribution by £15000.

The corresponding assessment for 2025 is £74000. We have already indicated to the Diocese that this is unreasonable and we would probably not be able to meet such a cost.

Future plans

A quinquennial inspection of the Church has taken place and has revealed some longer-term issues. The major more current issues identified in the report are being addressed.

Reserves Policy

The Council does not have a fixed level of reserves but it recognises that to be prudent it must strive not to allow the level of reserves to fall materially from where they currently stand.

Public Benefit

The Council has considered the guidance issued by the Charity Commission and are satisfied that through their community activities and utilisation of church property for community use are providing services to the general public in the Parish of Morriston.

Advisors

Independent Examiner

Bankers

Solicitors

Richard Nedin

HSBC plc

Approved by the Church Council on 15th March 2025 and signed on its behalf by

Margaret Jones

Chairman

St David's Church Morriston

Independent Examiner's Report to the members of the Church Council

I report on the Financial Statements of the Parish of Morriston for the year ended 31 December 2024 which are set out on the attached pages.

Respective responsibilities of Parochial Church Council and Examiner;

As the Parochial Church Council, you are responsible for preparing the financial Statements and consider that the audit requirements of section 43(2) of the Charities Act 1993 (the Act) does not apply. It is my responsibility to state, on the basis of procedures specified in the General Directions given by the Charity Commission under section 43(7)(b) of the Act, whether 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 Commissioners. An examination includes a review of the accounting records kept by the Parochial Church Council and a comparison of the Financial Statements presented with those records. It also includes consideration of any unusual items or disclosure in the Financial Statements, and seeking explanations from you as Parochial Church Council members concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently I do not express an audit opinion on the view given by the Financial Statements.

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
 - (a) keep accounting records in accordance with Section 41 of the Act; and to
 - (b) prepare Financial Statements which accord with the accounting records and to comply with the accounting requirements of the 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 Financial Statements to be reached.

Independent Examiner:

Richard Nedin

Date 15 March 2025

PARISH OF MORRISTON

PAROCHIAL CHURCH COUNCIL REPORT AND FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 DECEMBER 2024

Administrative information

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Its correspondence address is The Vicarage, 129 Clasemont Road, Morriston, Swansea SA6

The dedication of the Church is St David's and it is located on Woodfield Street, Morriston, Swansea.

Parochial Church Council (PCC) members

The PCC members who have served in the period from 16 April 2023 to the date of this report are as follows:-

Incumbent HN Lervy to 11 February 2024

Vicar's Warden Mrs M Jones

People's Warden Mr F Hollamby

Other Members

Mrs G Demery

Acting Secretary

Mr G Lewis

Treasurer

Mrs L G Lewis

Mr W K Lewis

Church Council members are appointed in accordance with the constitution of The Church in Wales and serve from the date of the annual parish meeting to the conclusion of the meeting for the following year. The parish meeting for 2023 was held on 16 April 2023

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Objectives and activities

The promotion of the whole mission of the Church, pastoral, evangelical, social and ecumenical in the parish.

Achievements and performance

	This year	Last year
Electoral Roll members	144	144
Easter communicants	128	109
Average attending members	94	98

Statement of Trustees Responsibilities

To comply with the provisions of the Constitution of the Church in Wales.

Review of the Year

The proposals in the Diocese to change the method of allocation of Parish Share was brought into effect for this year whereby the Deanery could decide its own apportionment between Parishes of a global amount allocated by the Diocesan Board of Finance and this is causing some uncertainty as to the costs which will be payable in the future by the individual Parishes. The PCC are therefore concerned that they ensure the continued maintenance of the Reserves which the Parish has accumulated over the past years.

During the year a new tenant was secured for the curate's house which resulted in an increase in rental income. No significant costs were expended on the property.

Financial Review

The Parish had a surplus in the year of £ £(2023- £27987). This surplus arose through the receipt of support from the Representative Body of the Church in Wales. The amount due for Parish Share was reduced by the receipt of grant from the RB to the Diocese during the periods of lockdown. Parish

Share for 2024 has reverted to its former levels and stands at £64,000 for 2024. We were not able to meet this level and were denied any assistance to reflect that the application of the apportionment formula to the Ministry Area had been misapplied in this case as it did not recognise that a vacancy would take at least twelve months to fill. We will need to be cautious and it is likely that we could suffer a deficit in 2025 which will reduce our reserves further unless we can increase our regular income. The PCC have also taken the steps to designate part of the funds available for future expenditure on Fabric repairs. The sum allocated represents monies received from the sale of the former vicarage and recent substantial legacies.

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Future Plans

A quinquennial inspection carried out in 2024 has identified some longer-term issues. The major more current matters identified in that report are being addressed.

Reserves Policy

The PCC have not fixed a level of reserves but it recognises that to be prudent it must strive not to allow the level of reserves as they currently stand to fall materially.

Public Benefit

The PCC have considered the guidance issued by the Charity Commission and are satisfied that through their community activities and utilisation of church property for community use are providing services to the general public in the Parish of Morriston.

Advisors

Independent Examiner

Richard Nedin

Bankers

HSBC plc

Solicitors

Approved by the Church Council on 15th March 2025 and signed on its behalf by

Maragret Jones
Chairman

St David's Church Morriston

Independent Examiner's Report to the members of the Church Council

I report on the Financial Statements of the Parish of Morriston for the year ended 31 December 2024 which are set out on pages 5 to 7.

Respective responsibilities of Church Council and Examiner;

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

Independent Examiner:

Richard Nedin

Date 15 March 2025

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Bankers

Solicitors

Richard Nedin

HSBC plc

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Margaret Jones

Chairman

St David's Church Morriston

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Independent Examiner:

Richard Nedin

Date 15 March 2025