

The Church of England

**PARISH OF SWANAGE**

**Annual Report 2023-2024  
and Statement of Accounts for 2023**



For the Parish of Swanage

Annual Parochial Church Meeting

to be held in All Saints Church, Ulwell, Swanage

**on Monday 22<sup>nd</sup> April 2024 at 7.30pm**



## **ANNUAL MEETING**

Monday 22<sup>nd</sup> April 2024 at 7.30pm  
All Saints Church

### **Annual Meeting of Parishioners**

#### **AGENDA**

- 1) **To receive Nominations from the Parish Churches St. Mary's, St. Marks and All Saints for Two Churchwardens from each, to serve until the Annual Meeting 2025.** *Churchwardens should have been nominated by the individual Churches at their respective annual meetings and the PCC Secretary informed. Technically, other nominations may be received in writing at or before this Annual Meeting.*

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### **Annual Parochial Church Meeting**

#### **AGENDA**

- 1) **Prayers:** Revd Dr Ian Bird
- 2) **Apologies:** to be recorded on a circulated list
- 3) **The Minutes of the Annual Parochial Church Meeting of 24<sup>th</sup> April 2023 were approved at the PCC on 13<sup>th</sup> June 2023; Matters Arising.** *Copies of the minutes are included in this booklet.*
- 4) **Reception and Discussion of Reports:**
  - a) Changes in the **Electoral Roll** since the last Annual Meeting
  - b) Proceedings of the **Parochial Church Council**
  - c) **Financial Statements of the PCC for the Year ended 31<sup>st</sup> December 2023**  
**(Pages: white section.... Treasurer)**
  - d) Reports from the **Churchwardens** on the fabric, goods, and ornaments of the churches of the Parish. *If there are significant developments to be notified to the Meeting, these should be reported verbally; otherwise no verbal report is necessary but the Inventory for each Church should be available to inspect and signed by the Rector. (Inventories should be submitted at this point.)*
  - e) Proceedings of **Purbeck Deanery Synod.** *A written report is included in this booklet.*

5) **Elections and Appointments:**

- a) **Church Lay Members** to serve for three years on the Parochial Church Council.
- b) The Appointment of **Deanery Synod** reps – not required this year
- c) The Appointment of the **Independent Examiner** to the PCC for the coming year.
- d) The Appointment of **Treasurer** to the PCC for the coming year.
- e) The Appointment of an **Electoral Roll Officer** for the coming year.

6) **Reception of other reports.**

7) **Safeguarding Report Review of Safeguarding Policy**

*(there is a copy of the Safeguarding Policy available in each church and on the Team Website)*

8) **Words from the Clergy**

9) **Other business: Date of the APCM in 2025 – TBC**

10) **Closing Prayers**



## REPORT FOR 2023 FROM IAN BIRD (TEAM RECTOR) & JO LEVASIER (TEAM VICAR)

We are really pleased to write the annual report together this year, particularly after a long period of vacancy within the Swanage Anglican Team. For both Jo and Ian, the most significant moment in the year was Jo's arrival and installation / licencing as Team Vicar at All Saints in July. I (Jo) would like to thank All Saints and the wider team for their warm welcome and I already feel very at home here. Thank you! I (Ian) am also grateful that our team is now at full complement, and we can start to look forward with energy and confidence. We are encouraged by the Salisbury Diocesan Vision of "Making Jesus known" and feel that this is a helpful and clear focus for all our churches in the years to come.

There are so many highlights of 2023 that we can't go over them all in detail here (do look in this annual report for more details) but one or two that we both felt we wanted to mention particularly.

It has been really encouraging to see how many members of all three churches are involved in the life of our local community: whether it is volunteering with Coastwatch, the Swanage Foodbank, Besom, Communicare Swanage, local choirs or one of the many other organisations supported by our church members. Being church is so much more than coming along to Sunday services and it is gratifying to see how many people are involved in everyday community life and service here. We hope to continue to grow and deepen our community support, sharing the love of Christ in practical ways, in the year to come.

It has been very exciting to see how connections have grown with our local schools in 2023, largely due to Jo's new role as Deanery School's Missioner. By the end of the year, we were starting to do assemblies in 5 primary schools (see schools section). We were delighted to welcome the whole of Swanage Primary School to St Mary's Church, and Year 3 from St Mary's RC Primary School to All Saints, for Christingle services in December. Again, we are looking forward to strengthening and growing this ministry in the coming year. One new venture planned for July 2024 is a local Leavers' Service at St Mary's Church for year 6 from at least 8 local schools across Purbeck.

Other particular highlights for us both include the team Harvest lunch at All Saints in October when nearly 100 members of all team churches enjoyed a baked potato lunch, fellowship and a brilliant game of Pictionary (just as fun to watch if you were organising, as to participate!). We are rejoicing in the new sense of community and unity across the team which was joyfully evident on this occasion.

The Sea baptisms and reaffirmation of vows that we held in September were certainly a highlight for me (Jo) - it certainly rang the changes from my previous ministry and was a strong declaration that God is at work amongst us.

We are grateful for some movement in unlocking access to historic restricted funds and we look forward to exploring with the PCC in 2024 the utilisation of some of these in support of our ministry, particularly amongst children and families. A huge thank you also to everyone who has supported our team financially. We are conscious that many give sacrificially, and we continue to depend on one another's generosity and those who support us with legacies.

There are so many people to thank that we cannot begin to mention everyone: but you know who you are - whether you regularly get up early to open up one of our churches, cut the grass, make coffee, welcome people to a service, sing, play, phone up another church member to see if they are okay - all these things are hugely appreciated and we rejoice in being the body of Christ with you. A special thanks also to the wonderfully supportive team of retired clergy who make so many services possible - not only in our Anglican churches in Swanage and Studland, but also in other denominations and in our neighbouring benefice. It is a privilege to be part of such an enthusiastic and gifted team.

*May the God who gives endurance and encouragement,  
give us the same attitude of mind toward each other that Christ Jesus had  
so that with one mind and one voice we may glorify  
the God and Father of our Lord Jesus Christ.*

*Romans 15:5-6*

With every blessing Ian and Jo.

## PURBECK DEANERY SYNOD REPORT

I wrote last year on the March meetings so now note the meetings in the last 12 months.

There have been only two deanery Synod meeting in the last year as the Summer one was cancelled due to a change in Rural Dean on the departure of Rev Ian Jackson and pending appointment of the replacement. Therefore the planned Synod Eucharist was abandoned.

The new Rural Dean is Rev Canon Richard Bartlett who is incumbent of the West Purbeck Benefice based in Wool but covering :- Wool and East Stoke, Bere Regis, Affpuddle with Turnerspuddle, The Lulworths, Winfrith Newburgh and Chalden. Surely one of the most spread and rural patches in the Diocese!

The first meeting took place at All Saints church, Swanage on 18<sup>th</sup> October 2023 when our own Simon Lole gave a presentation of his life in music and the various roles he has had and the various forms of Music and the place of music of all types in church worship. His background of growing roles from chorister and then leading choral music in different churches and cathedrals as well as freelance work and culminating as our own Director of Music here in St Mary's Swanage. This freelance work including with Aled Jones followed his spell as Director of Music at Salisbury Cathedral. He is well known as a broadcaster and frequently appeared on BBC 3 'The early music show' 'The Choir and 'Songs of Praise' He has been Music Director and Organist of radio 4 'The daily Service' for 20 years.

This lifetime experience of multiple churches with various contacts together with the broadcasting work gave him a good view of the changes over the last 50 years to church music. His passion is to retain the choral traditions of the Church alongside the more modern worship. He is very concerned that the historical base be maintained before it is lost and recommended that others encouraged choral tradition such as we do here in Swanage with our 'come and sings' could improve the enormous shortfall of traditional evensong music that currently exists.

Then followed a short Synod Meeting which covered introductions and welcome to all the new Synod members appointed at the previous parish AGMs. There were two lay Deanery officers required to fill vacancies after the Secretary Allan Smith agreed to continue. One was for Deanery Treasurer and the other was for Lay Chair.

Mike Hampton from Swanage agreed to cover the Treasurer role as there were no volunteers but in the absence of a volunteer the lay Chair position was left vacant pending finding a suitable person. It was also noted that our own Ian Bird was a member for clergy at Deanery synod and also Diocesan Synod. The meeting finished after noting that the next meeting would be at Wareham on 13<sup>th</sup> March.

The next meeting was held at Wareham Parish Hall on 13<sup>th</sup> March 2024

when Rev Canon Jonathan Triffitt spoke on the Diocesan mission of 'Making Jesus known'. After introducing himself, he outlined the 5 elements of the Mission strategy of making Jesus known in every place so that all might flourish and grow, seeking His Kingdom here and now.

The five elements highlighted were:- Courageous Christian leadership...Working for Justice...Championing Climate justice...Creating partnerships...Finance and future stability.

He made the several points in addition to reviewing some of the things that might be done including suggestion by the synod members in groups. He stressed the need to allow the excluded to be heard and to recognise young people in leadership especially on Climate Change issues. He also stressed that the whole Diocese needed to have sustainable Finance and that traditional practices were reaffirmed. The need to acknowledge that stipendiary ministry was limited and reminded us that we are all called to be witnesses and that lay participation was essential. Partnerships, both within the churches and also with



other organisations needed to find new ways of working within our communities and build on existing ones. It was noted that the message was clear and simple, that it was to be Parish driven with support from Diocese. There is a more comprehensive leaflet available.

The Rural Dean then thanked Jonathan for his presentation.

The meeting then turned to the Synod agenda which apart from the apologies and previous minutes went on to elect the Officers for the next three years as required, Namely

Lay Chair: Carol Richards from Swanage (St. Marks)

Secretary: Allan Smith a long term experienced officer to keep us on the strait and narrow!

Treasurer: Mike Hampton from Swanage (St. Mary's)

The standing committee would consist of these three as lay members and the Rural Dean (West Purbeck), Ian Bird (Swanage) and A.N Other as Clergy members.

Ian Bird then gave a brief summary from the Diocesan Synod which covered the approval of the revised Paris share system for 2025 and a discussion on the Vision statement.

The Rural Dean welcomed Rev Deborah Swann and Rev Neil Kelly for Wareham as well as announcing that Rev Lindy Cameron would be licensed as pioneer minister to St Aldhelm benefice on 17<sup>th</sup> April then thanked Rev Canon Simon Everett (Wareham) resigning in June and Rev Sandra Williams (West Purbeck) resigning end April for their service to the Deanery.

NEXT MEETINGS 19<sup>th</sup> June Deanery Eucharist at St Nicholas Studland and 8<sup>th</sup> October at Wool CofE school when our own Jo Levasier would talk on Engagement with Schools.

*Mike Hampton*

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## **SAFEGUARDING REPORT**

Safeguarding continues to be taken very seriously here in Swanage and Studland. It involves promoting a safer culture and environment within our churches. It is about preventing and protecting those that are at risk of being abused and responding well to those that have been abused. It is also about taking care to identify where a person may present a risk to others and offering support to them whilst taking steps to mitigate such risks.

The child, young person and vulnerable adults safeguarding policy is reviewed annually and safeguarding is now a standard item on all committee agendas. Safeguarding contact information posters are displayed prominently on church notice boards. A Safeguarding information file is kept in each church.

The Safeguarding team now uses a Parish Safeguarding Dashboard which is an online tool that helps our PCC keep track of safeguarding in our churches.

We are continuing to work on Risk assessments and Safer Recruitment guidance for all church based activities.

*Margaret Griffin*  
*Safeguarding Officer*

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## ELECTORAL ROLL REPORT

Once again I must thank the "Electoral Roll Assistants" in each church without whose help it would be very difficult to keep the Roll up to date.

I am extremely grateful to Tim Silk at All Saints', Marion Marchant at St. Mark's and Rosemary Carpenter at St. Mary's for the help they have all again given me over the past year to ensure that I am aware of the comings and goings of people. Their input is essential and I thank them most heartily for keeping me up to date.

I would ask everyone else in the Parish to help by letting us know about changes of address or other details in the Roll either to them or to me as soon as possible.

Of course we all should be encouraging new members of our churches to join the Roll so that they can feel more involved in the church and vote in the election of the PCC and officers including the parish representatives at the deanery synod.

The overall numbers have come down by 14% since the last revision in spite of several new members signing up – there is inevitably an ebb and flow on such a list (particularly as people move away from the area) and you will see we were close to this current figure back in 2013 but rebounded strongly.

These Rolls are fully revised every 6 years and next year everybody will be invited to renew their application.

For the individual churches - All Saints' membership has come down to **133**; St. Mark's remains at **47** and St. Mary's is down 7 at **165**.

	Parish	All Saints	St Mark's	St Mary's	
<b>2024</b>	<b>345</b>	<b>133</b>	<b>47</b>	<b>165</b>	
2023	394	175	47	172	
2022	412	186	49	177	
2021	412	191	49	179	
2020	435	203	50	182	
2019	433	207	47	179	New Roll
2018	440	197	57	186	
2017	439	194	54	191	
2016	432	180	58	194	
2015	435	181	57	197	
2014	375	121	58	196	
2013	<b>356</b>	<b>124</b>	<b>55</b>	<b>177</b>	New Roll
2012	439	145	65	229	
2011	447	148	63	236	
2010	452	148	68	236	

*Francis Barnard*  
Electoral Roll Office

The Swanage & Studland Team Ministry: Parish of Swanage  
**ANNUAL MEETING**  
 Monday 24<sup>th</sup> April 2023 in St. Mary's Parish Church  
**Annual Meeting of Parishioners Minutes**

The Meeting was chaired by The Reverend Dr Ian Bird with 33 members present.

**Appointment of Churchwardens: Two Churchwardens from each church, to serve until the Annual Meeting 2024.** *Churchwardens were nominated by the individual Churches at their respective annual meetings.*

A correction to the date on the printed agenda was noted and should read – ‘those to be nominated will serve until the Annual Meeting in 2024’ not 2023.

**Churchwardens:**

St Mary's:	<b>Name:</b>	Avril Harris	Lavinia King
	<b>Proposer:</b>	Rosemary Carpenter	Rosemary Carpenter
	<b>Seconder</b>	Ray Davis	Ray Davis
St Mark's:	<b>Name:</b>	John Way	Anne Roper
	<b>Proposer:</b>	Marion Marchant	John Way
	<b>Seconder</b>	Anne Roper	Jean Bettles
All Saints:	<b>Name:</b>	Tim Silk	Heather Lightowler
	<b>Proposer:</b>	Claire Head	Mike Hayes
	<b>Seconder</b>	Michael Campbell	Pauline Bexon

No other nominations were received at the meeting. It was proposed from the Chair that the following nominations be accepted and the above appointments were agreed unanimously by all present. The Reverend Dr Ian Bird acknowledged the work of retiring churchwardens, Claire Head and Michael Campbell over the past few challenging years and all they had done to contribute to All Saints Church, the Parish and Team.

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### Annual Parochial Church Meeting

- Prayers:** The Rector opened the meeting with a reading from the book of Hebrews, chapter 12 followed by a reflection and prayer.
- Apologies:**

Ro Clark	Jenny Lazenbury	John Lazenbury	Mike Hayes
David Colborne	Kevin Burke	Yvonne Lennard	Andrew Head
Liz Brown	Penny Campbell	Avril Harris	Jonathan Hallett
- The Minutes of the Annual Parochial Church Meeting of 27<sup>th</sup> April 2022 were approved at the PCC meeting on 9<sup>th</sup> June 2022. Matters Arising:** None
- Reception and Discussion of Reports:** The Rector thanked everyone who provided reports for the meeting.
  - Changes in the **Electoral Roll.** The report as given stands with no changes just two amendments (1) the addition of - ‘All Saints membership is down 11’ (2) ‘St. Mark’s is down 2 and not 1’. Proposed by Lavinia King and seconded by John Way – All in favour.



- a. Proceedings of the **Parochial Church Council**. This was accepted by the PCC and signed by Revd Ian Bird on the 29<sup>th</sup> of March 2023. Proposed by Tim Silk and seconded by Anne Roper – All in favour.
- b. **Financial Statements of the PCC for the Year ended 31<sup>st</sup> December 2022**. John Way, Treasurer, thanked the good team behind him and the tremendous help from Mel Dyke, Bookkeeper and Ian Bandy especially for help in preparing the annual accounts. Last year John reported on church finances as we came out of lockdown. Understandably serious issues had to be explained and steps taken to work towards remedying these. A working group had previously been set up to consider approaches to the problems which were evident and the work of looking at strategy to help with finances is ongoing. Reporting on 2022 finances we still see in action many of the issues highlighted last year. In particular the number of regular attenders at our churches has reduced and impacted on our income, and as with other churches, our situation is far from unique. We are very grateful to David Tyrrell who has Independently examined our accounts at no cost saving the parish in excess of £1,000.

Looking at the accounts in more detail John Way highlighted aspects relating to income. Planned giving is down on 2021 figures and as a result tax reclaim is also reduced in line with giving. Collections and appeals are up on 2021 and there was a good response to the Gift Day in November. Hall rental is increasing and bank interest received is up. A substantial legacy for the benefit of St. Mary's Church has been received from the estate of the late Shirley Strickland and will feature in the 2023 accounts.

Focusing on expenditure a one-off reduction of £20,000 for our Diocesan share has been agreed by the Archdeacon to take account of 3 years without a Team Vicar. A modest pay rise was agreed by the PCC for employees and The Wave agreed to pay part of the Youth Ministers salary in 2022 and also for 2023. Utility costs have increased by £3,000 and it is estimated they will rise further in 2023 to £28,000.

Looking at the overall picture with income still continuing to drop and expenditure only reducing modestly we need to evaluate our financial security. We are not 'bankrupt' as we have reserves of £417,001 but if the current trends continue, within a few years, we would be described as such and to this end a number of lines of enquiry are being investigated to mitigate this situation. Currently our unrestricted fund figure is low. The PCC has to have a policy statement that the unrestricted reserves will not fall below a figure decided by the PCC. Our policy is that we should not have less than 3 months reserves. At the end of the year on which we are reporting, that figure was a little below 3 months but having received the legacy referred to earlier we are now back above it. When we receive a legacy, even if it is given for 'general purposes' (as this one was – specifically naming St. Mary's) we try to find something in memory of the generous donor on which to spend it. So, although the legacy has repaired some of the concern over our year-end reserves, we will not rest on that. As mentioned last year and in the finance report we are investigating the possibility of releasing funds from the restricted and endowment funds.. This work is in the very capable hands of David Williams who is having extensive consultations on this and making good progress and we thank him for his devotion to this task.

Last year, John Way asked this meeting to remember the finances of the church and those who work on it, in their prayers. Much of what we do is below the surface and not seen but it is vital to maintain the mission and worship of the church, so please continue to pray. John Way then opened the floor to questions on the Financial Statements and Accounts.

It was asked for clarification on page 15 - 2 Voluntary Income about the decrease of £8,000 from 2021. It was clarified that Unrestricted planned giving was £133,00 in 2021 and had fallen by £5,000 in 2022 to £128,314 and Restricted giving which was £25,000 in 2021 by £3,000 in 2022 to £22,014.

It was asked why the Hallsworth Fund given for St. Mark's was lower. During 2022 by agreement with the PCC an amount of money was taken from the fund to pay for St. Mark's commitment to Parish funds. It was also agreed by the PCC to use money from funds held by St. Mary's and All Saints to meet parish funding shortfalls.

There being no further questions acceptance of the Financial Statements and Accounts for 2022 was Proposed by John Way and seconded by David Williams – All in favour.

c. **Reports from the Churchwardens** on the fabric, goods, and ornaments of the churches of the Parish. Changes reported to the meeting – St. Mark's Church have purchased a new cooker and are reviewing old hymn books no longer used. All Saints Church have purchased a new lawn mower. The inventories were presented and signed by the Rector.

d. **Proceedings of Purbeck Deanery Synod.** A written report was included in the APCM booklet. Thanks were extended to Mike Hampton for preparing the report

## 5. **Elections and Appointments:**

### a. **3 Church Lay Members to serve for three years on the Parochial Church Council.**

Each church is entitled to have three elected lay members for a 3-year term of office. It was proposed from the Chair that the nominations received from the churches for Trish Clark, John Hallett, Ro Clark, Liz Moreton and Stephen Higgins be accepted. The appointments were unanimously agreed by all present.

**St Mary's:** Margaret Griffin (2025) Trish Clark (2026) John Hallett (2026)

**All Saints:** Mike Hayes (2025) Ro Clark (2026) Liz Moreton (2026)

**St Mark's:** Colin Burgess (2024) Joanna Penley (2024) Stephen Higgins (2026)

b. The Appointment of **Deanery Synod** representatives - two from each church for the new triennium. It was proposed from the Chair that the nominations received from the churches as listed below be accepted. The appointments were unanimously agreed by all present.

**St Mary's:** Mike Hampton, Julie Pike

**All Saints:** David Williams, Barbara Jackson

**St Mark's:** Carol Richards, Anne Roper

c. The Appointment of the **Independent Examiner** to the PCC for the coming year: David Tyrrall was Proposed by John Way and seconded by Nick Viney. The appointment was unanimously agreed by all present.

d. The Appointment of the **Treasurer** for the coming year: It was proposed from the chair that John Way continues as Treasurer for the coming year. The appointment was unanimously agreed by all present.

e. The Appointment of an **Electoral Roll Officer** for the coming year: It was proposed from the chair that Francis Barnard continues as Electoral Roll Officer for the coming year. The appointment was unanimously agreed by all present.

## 6. **Reception of other reports.**

It was proposed from the chair that the reports be accepted. Unanimously agreed by all present.

## 7. **Safeguarding Report and Review of Safeguarding Policy** – A written Safeguarding report was included in the APCM booklet. It is a requirement that our Safeguarding Policy is reviewed ( this was done at the PCC meeting in March 2023) and adopted at the APCM. Copies are available in each church and on the Website. Current Safeguarding Officers in our churches,



Griffin, St. Mary's. Jane Hawkswood is the Safeguarding Officer for St. Nicholas Church, Studland. The Rector thanked the Safeguarding Officers in the Team for all the work they do. They are meeting regularly as a group and will be encouraging those who need to, to engage in on-line training and further information will follow. It was proposed from the chair that the Policy and Report be accepted. This was unanimously agreed by all present.

**8. Date of the APCM in 2024: Monday 22<sup>nd</sup> April at 7.30pm**

**9. Other business:**

- a. **Vote of thanks** – Anne Roper thanked the Rector for his leadership, her fellow churchwardens, our retired clergy and everyone else who works together for the body of Christ through prayer and worship in the parish and Team. Our Team of churches is diverse and there will always be challenges but as we move forward in the light of Christ, looking forward to welcoming the Revd Jo Levasier in the summer we look to the future with hope for all the opportunities it holds.
- b. John Way passed on the good wishes of John Mann for this meeting. John Way asked that if anyone has ideas and suggestions of how we may save or reduce our outgoings or increase giving to please get in touch with him. One suggestion to consider is the APCM booklet being available on-line rather than printing copies. This would be a matter for the PCC to discuss during the year.

**10. Words from the Rector**

The Rector thanked everybody involved in the life of the parish and our Team. Church would not function without the willing volunteers who use their skills and time in our churches and community. The Rector thanked the retired clergy and for their great wealth of wisdom, skills and experience. In particular he thanked Revd Dave Richards, Resident Priest at St. Marks and Revd Tony Higgins at St. Nicholas. It is great to work with them both and he is looking forward to welcoming and working with Revd Jo Levasier when she arrives.

Revd John Staples has withdrawn and retired from everything. The Rector thanked him for all he had done within the Team and particularly his pastoral support and wished him a happy retired retirement.

The Rector thanked everyone on behalf of himself and Judith for the warm welcome they had received which has helped them to settle well.

There is a huge amount of work and ministry going on with so many people involved which is great to see and particularly with people in all sorts of areas in our wider community, and to name a few – the food bank, Communicare, Disabled club, support for Ukraine, Linking Lives, local government.

There has been a great response to the Warm Places initiative with Tea-Pot now meeting weekly and Coffee Pot extending their hours and offering a hot meal.

It is good to be involved in services without restrictions, the use of face masks dropped and refreshments after services restored.

It is amazing how right the Profile prepared for the Rectors appointment actually was highlighting the unique selling points of each of our churches which we will be looking to develop further in the coming months and years.

There is increased engagement with schools. Three foundation governors have been appointed for St. Mark's CE Primary School and closer links are being re-built with St. Mark's Church.

Music at St. Mary's continues to be a blessing with the Come and Sing Evensongs and a music workshop with Bob Chilcot at the end of April to which 150 have signed up to attend.

Churches Together is working well, supporting one another and in witness with Carols at the Rotary Christmas Market, Christian Unity service in January and Easter Sunday dawn service by the Banjo pier. Plans are being made for a Walk of Witness on Good Friday 2024. Nick Vlney's work for Churches Together was acknowledged.



by the Banjo pier. Plans are being made for a Walk of Witness on Good Friday 2024. Nick Viney's work for Churches Together was acknowledged.

Looking to the future a Lay Pastoral Assistant course will take place in conjunction with the West Purbeck benefice. Revd Jo Levasier's licencing will take place on Thursday 6<sup>th</sup> July at All Saints church by Bishop Karen. It will be great to have Revd Jo as Team Vicar based at All Saints and undertaking 2 days a week as Deanery Schools Missioner. Once Revd Jo is in post there will be engagement with the PCC and others to look at the Team Vision and Mission. There will be opportunities to explore how we can better share God's good news and serve those around us in our community by what we say and do in Swanage and Studland. We are all asked to pray for all these things and our future vision and direction as a Team.

All three churches have had their Quinquennial Inspections which take place every 5 years. The good news is that no big issues have been highlighted but there are things that we need to plan for and address. Thank you to all who maintain our buildings for worship and mission, they are unsung heroes.

We do however face challenges with the finances of the Parish and will be forming a Finance Sub Committee of the PCC to plan strategically for the future so we are in a good and better position to continue to develop our worship and mission. David Williams is exploring how we can release money from some of our trust funds which no longer meet the criteria for which they were set up and we are grateful for all he has done so far and will continue to do as we move forward with an action plan and discussions with the Charity Commission. The help and support of Ian Bandy in matters of finance and giving must also be acknowledged and we are grateful for his continued support.

The Rector expressed thankfulness to God for all he has given us and the rich blessings to the church in Swanage and our church communities. The hope is we will celebrate and communicate more all that we do as a Team.

**11. Closing Prayers** - the Rector closed the meeting with prayer and the Grace.

**Meeting finished at 8.49 p.m.**



**The Parochial Church Council of the  
Ecclesiastical Parish of Swanage**

**Annual Report and Financial Statements  
for the Year Ended 31<sup>st</sup> December 2023**

**Registered Charity number: 1134114**

**Parish Office:**

St Mary's Rooms  
Church Hill  
Swanage  
Dorset  
BH19 1HU

**Trustees:**

The Reverend Dr I Bird  
The Revd J Levasier  
T Silk  
M Marchant  
J. Way  
C. Burgess  
R Clark  
T Clark  
M Griffin  
J Hallett  
M Hampton  
A Harris  
M Hayes  
S Higgins  
B Jackson  
H Lightowler  
L King  
E Moreton  
J Penley  
J Pike  
C Richards  
A Roper  
D Williams

(Team Rector)  
(Team Vicar - From July 2023)  
(Lay Chair)  
(PCC Secretary)  
(Treasurer)

## **Bankers**

CAF Bank  
25 Kings Hill Avenue  
Kings Hill  
West Mailing  
Kent  
ME19 4JQ

## **Independent Examiner**

Mr David Tyrrall FCMA  
Flat 5  
Melsan Court  
13 Park Road  
Swanage  
Dorset  
BH19 2AA

## ANNUAL REPORT FOR 2023

*The Parochial Church Council is required by law to make the following written report.*

### Aim and purposes

Swanage Parochial Church Council (PCC) has the responsibility of cooperating with the Team Rector and Team Vicar (vacant until July 2023), in promoting in the Ecclesiastical Parish of Swanage, the whole mission of the Church, pastoral, evangelistic, social and ecumenical. It also has maintenance responsibilities for the Parish Church of St Mary the Virgin, St Mary's Rooms and the Rectory Classroom, St Mark's Parish Church, Herston, and All Saints' Parish Church and Hall, North Swanage.

### Parochial Church Council Membership

Members of Swanage PCC are either ex-officio, co-opted or elected by the Annual Parochial Church Meeting (APCM) in accordance with the Church Representation Rules of the Church of England. During the year, the following served as members of the PCC:

#### a. Ex-Officio Members

##### Licensed Clergy

The Revd Dr Ian Bird	Team Rector
The Revd Joanna Levasier	Team Vicar (From July 2023)

##### Churchwardens

St Mary's: Lavinia King (First elected 27<sup>th</sup> April 2022)  
Avril Harris (First elected 15<sup>th</sup> April 2013)

All Saints: Tim Silk (Elected April 2023)  
Heather Lightowler (Elected April 2023)

St Mark's: John Way (First elected 27<sup>th</sup> April 2022)  
Anne Roper (First elected 16<sup>th</sup> April 2018)

#### Diocesan and Deanery Synod Members

Mike Hampton  
Barbara Jackson  
Julie Pike  
Carol Richards  
Anne Roper  
David Williams

#### b. Elected Members (with year of retirement)

*At the APCM of 2004 it was agreed that each Church would elect three members from its Church Committee, to serve for three years. Vacancies in previous years which have now been filled have altered this agreed principle.*

Colin Burgess, Joanna Penley (2024)  
Mike Hayes, Margaret Griffin (2025)  
Jonathan Hallet, Stephen Higgins, Liz Moreton, Trish Clark, Ro Clark (2026)

### **c. in attendance**

Youth Minister                      Berno Vierbergen      (appointed June 2016)

## **COMMITTEES**

**The Parochial Church Council of Swanage** meets four times per year. Members include the Team Rector, Team Vicar, Treasurer, Youth Minister, PCC secretary, Lay Chair, Churchwardens, Deanery Synod representatives and representatives drawn from each of the three individual church committees. It is chaired by the Rector or the Lay Chair.

The PCC operates through a number of committees, which normally meet between full meetings of the PCC.

**The Standing Committee** is required by law and members consist of The Rector, Team Vicar, Treasurer, six Churchwardens two from each of the three churches, the PCC secretary and Lay Chair. The Standing Committee has the power to transact the business of the PCC between meetings of the Council, subject to any directions given by Council and meets four times a year. The PCC has agreed that the Standing Committee should also act in support of the Treasurer, although decisions about finance remain the responsibility of the full PCC.

### **Individual Church Committees**

The three parish churches of St Mary, St Mark and All Saints each have their own committee. These are elected, consultative committees, chaired by one of the clergy or an elected lay officer. These bodies deal with the day-to-day running of the churches and make recommendations to the PCC in matters that require the agreement and authorisation of the PCC or Diocesan authority.

In order to deal with specific areas of church life, the church committees appoint sub-committees or working groups as need arises. These are accountable to the church committee responsible and ultimately through it to the PCC.

## **CHURCH MEMBERSHIP AND ATTENDANCE**

One Church Roll is maintained for the Parish. In 2019 the Electoral Roll was completely re-made and is due for its next remake in 2025. At the Swanage Annual Parish Meeting in April 2023 the number of members reported was 394, a decrease of 39 from the 2019 figure of 433.

## **FINANCIAL STRUCTURE AND POLICY**

The day-to-day administration of finance is carried out by the part-time Bookkeeper who works closely with the treasurer. The cash from collections and other sources is counted and banked monthly. Mr. John Way, the treasurer, reports to the Standing Committee and PCC and has been supported throughout 2023 by Ian Bandy, a previous treasurer, and also by a Finance working group.

All figures in the report and the accounts are uninspected but the inspected figures will be reported at the APCM and copies of the full inspected accounts will be available.

The reserves policy of the PCC is to maintain a balance on unrestricted funds. In March 2023 the PCC agreed to reduce the reserves figure from 6 months to 3 months with an annual review. This equates to £75,000, approximately three months' unrestricted payments, to cover emergencies that may from time to time arise. Current unrestricted reserves equate to approximately 2.4 months' payments.



Budgets are set annually with a view to maintaining the health of the PCC funds over the long term. In recent years, this has necessitated utilising available capital funds to compensate for reduced income. When funds are not needed with instant access it is the PCC's policy to invest balances in funds run ethically by investment managers such as CCLA. As of 31st December 2023 the PCC has unrestricted funds of ££30,738 (2022: £57,739), Restricted funds of £257,289 (2022: £175,158) and Endowment funds of £193,423 (2022: £184,104).

A review has begun of the PCC's older funds, particularly Endowment funds, as the original purpose for which these funds were given has long passed. This review is being led by David Williams. The outcome of the review will allow these funds to be used in a way that meets the needs of the PCC today and into the future, but it is recognised that any change of use will require the agreement of the Charity Commissioners.

## **RISK MANAGEMENT**

Financial risks are managed and regulated by regular examination by the Standing Committee, which reports to the Trustees at the PCC. The Treasurer, Rector and churchwardens have monitored income and expenditure closely during 2023 reviewing and proposing budget amendments to the Trustees at the PCC as appropriate.

A Safeguarding Children and Vulnerable Adults Policy has been adopted, with each church in the Team having a nominated Parish Safeguarding Officer who also acts as Verifier to manage Disclosure & Barring Service issues. The PCC is using the Salisbury Diocese mandatory Safeguarding Action Plan for each church in the Team. All PCC members are required to undertake basic safeguarding training. Safeguarding issues are discussed at each Standing Committee and PCC meetings and current policies and training events are addressed.

## **PUBLIC BENEFIT**

The PCC have given due regard to public benefit when planning the church's activities, in accordance with section G2 and G3 of the Charity Commission's General guidance on Public Benefit (January 2008). The paragraphs above and below set out the PCCs activities, achievements and performance during the year, which are directly related to the objects and purposes for which the church exists.

The church achieves its principal objects and purposes through:

- high quality public worship, both traditional and contemporary
- pastoral care and support of those in need
- promotion of Christian Aid, mission agencies and other charitable causes.

These benefits are directly related to the aims of the church and are fully compliant with Principles 1 and 2 of the Charity Commission Principles on Public Benefit.

**Mission Statement** – The Parish of Swanage is part of the Swanage and Studland Team Ministry which promotes the following mission ethos: The churches of the Swanage and Studland Team Ministry aim to welcome all, to be prayerful and caring as we seek the will of God and strive to do His work. We recognise the ministry of all Christians, male and female, ordained and lay in supporting all in the local community. We aim by various means to support local, regional, national and international organisations which act to improve the lives of others and to share the Gospel.

There are separate reports for each church in the team (see below).

## **REVIEW OF THE YEAR**



### **PCC Secretary's report: (Appointed May 2018)**

In accordance with the objectives listed above the PCC moved to achieve its aims in 2023 through the following:

The PCC scheduled four meetings for the year and four meetings of the Standing Committee. At each meeting the day-to-day business of the Anglican Church in Swanage is discussed. Any repairs to fabric or fittings, alterations or large purchases are discussed and permission to proceed given. Policies have been reviewed during the year. A financial report produced by the Treasurer and the current state of the finances is discussed in detail. There continues to be concerns about the state of the finances, but the PCC is very grateful to the Honorary Treasurer, Ian Bandy and the Finance Working Group for careful and considered advice regarding management of investments and of the PCC budget. The Wave contributed towards 6 months of the Youth Ministers Salary. The Parish Giving Scheme (PGS) and donation stations installed in 2021 in St. Mary's and All Saints churches has resulted in congregations continuing to be generous, and together with a gift day in October 2023 and legacies has enabled the PCC to meet increasing financial demands. The Revd Joanna Levasier was appointed Team Vicar and took up her post in July 2023. The full minutes of the PCC meetings are made freely available in the individual churches for all Church members and interested others. Information about the activities of the three individual churches is recorded in the PCC's annual report booklet for 2023.

### **Swanage Team Ministry:**

The Team Ministry was inaugurated in 1986 to cover the United Benefice of Swanage and Studland and its present constitution was established in 2004. It is headed by the Team Rector whose prime day-to-day ministry is focused on the historic Parish Church of St Mary the Virgin in central Swanage, supported by the Team Vicar, (Vacant from July 2020- July 2023) based at All Saints Church in north Swanage. The ministry of St. Mark's is overseen by the Rector but is led by Resident Priest, the Revd. David Richards. St Nicholas' Church, Studland, a separate parish from Swanage, but an integral part of the benefice Team, is managed day-to-day by Resident Priest the Revd. Tony Higgins, with the PCC being chaired by the Team Rector. We are blessed by having a number of retired priests who lead services and assist in aspects of ministry in the two parishes. Since September 2023, the neighbouring St Aldhelm's Benefice has been in vacancy and several of our retired priests have led services there too.

Each church in the team is individual, meeting the needs of its congregation and together they offer a wide range of worship styles and approaches. St Mary's, St Nicholas and St Mark's present a more traditional form of Anglican worship. All Saints is contemporary in style, Evangelical in theology and is a member of the Evangelical Alliance. St Mary's hosts the Civic and community services and combined team services for the year round festive occasions alternate between the churches. We are pleased that in 2023 the three churches have a renewed sense of teamwork, co-operation and desire to work together to Make Jesus Known in our community.

Swanage Team Ministry has strong ecumenical links with the other churches in the town and is part of Swanage Churches Together, taking a part in organising and participating in any ecumenical ventures for the town including the promotion of Christian Aid and other mission and charitable initiatives. The network meets on a regular basis and organises ecumenical joint services and activities throughout the year. The Swanage and Studland Team is a major participant in The Wave Christian Youth Project (*see below*). The Food Bank is run ecumenically and has been developed to meet the ever-increasing needs of the community which has been of particular importance and support to many families during 2023. Churches Together in Swanage set up an active group to consider the plight of refugees which includes members of the helping agencies and other members of the community with specific skills.

**The Wave Christian Youth Project** is a charity which, following an internal review, now focuses on youth work, bringing together Youth Ministers from two different churches and denominations across the town. The project focuses on supporting young people aged 11 to 18yrs through the highs and lows of their lives, as well as providing them with the opportunity to explore the Christian message. The project has two foci: outreach and schools work through mentoring and Christian Union groups at both Swanage and Purbeck Schools. The Wave agreed to contribute towards 6 months of the Anglican Youth Ministers Salary till June 2023, after which the Team resumed paying the full salary.

[www.thewaveyouth.co.uk](http://www.thewaveyouth.co.uk), [www.facebook.com/thewaveyouth.uk](https://www.facebook.com/thewaveyouth.uk)

<b>Occasional Offices and Life Event Services in the 3 Parish Churches</b>	
Baptisms	8 (5 children; 3 adults)
Re-affirmation of Baptismal Vows	2
Thanksgiving for the gift of a child	1
Confirmation	1
Weddings	3
Funerals at Church	23
Funerals at Crematorium	9
Thanksgiving Services	2

Occasional Office and Life Event services in Swanage Parish for 2023

## **The Team churches**

### **St Mary's:**

The Parish Church of St. Mary the Virgin, Swanage, is a large, impressive structure built of local Purbeck stone situated in the centre of the town. It is open all day, every day. The church tower houses eight bells rung twice each Sunday, and also, when requested, for weddings and funerals, by an enthusiastic team of bell ringers who rehearse each Wednesday evening. Daily Morning Prayer and a mid-week Holy Communion Service are held in St Aldhem's Chapel and the Blessed Sacrament is reserved there.

The weekly Tuesday afternoon service, All Things Bright and Beautiful, has continued throughout this year. Provided primarily for those with dementia and their carers, it takes the form of a short, simple, service, led by various clergy, followed by activities and refreshments, co-ordinated by Brigit Coffin, ably assisted by a team of volunteers.

The Junior Church for primary age children continues to run in parallel with the 10.30am Sunday Choral Eucharist and provides activity, instruction and simple worship. The group is led by Hatty Fawcett, ably supported by volunteer parents. On the first Sunday of the month, in our Family Eucharist, members are involved in reading scripture, leading prayers, welcoming and serving refreshments. Once a month Junior Church joins Walking Church with groups from other churches, led by Revd. Nick and Naomi Webb. In the Autumn, the initially named *Friday Fun Club* was successfully launched, meeting on Fridays 6.30-8pm in term time and led by Berno Vierbergen, our Team Youth Minister, ably assisted by volunteer members of St Mary's congregation. Linked to the St Mary's Junior Church and the Junior Choir, the group is open to all.

The Sunday 10.30a.m. Choral Eucharist is central to regular worship, and is enriched by St Mary's strong choral tradition. The Director of Music, Simon Lole, and Associate Director, David Fawcett, with the choir contribute greatly to the quality of worship at the Sunday Choral Eucharist and weekly Choral Evensong as well as occasional services. In addition to regular worship, the church normally hosts the annual Civic Service, the Town Remembrance Day Service and the Town Carol Service.

"Come and Sing" Choral Evensong, held once a month, continues to thrive. Nationally recognised Directors of Music rehearse St Mary's Choir and other singers who attend, with a refreshment break before the service itself. Most months this doubles the numbers in both choir and congregation. Distinguished guest Directors of Music have been engaged by Simon Lole in an annual programme, enhancing the service with different styles of conducting being experienced.

St Mary's Junior Choir is directed by David Fawcett, Associate Director of Music. It is open to boys and girls in Year 3 and above who love to sing and who can read confidently. Junior Choir has weekly practices and joins the adult choir for a family-oriented Choral Eucharist each month and for special services such as the Town Carol Service and Crib Service.

St Mary's hosts a number of special musical events both by local musicians, choirs and singers, and visiting professionals. Concerts are hosted during Purbeck Arts Week, Purbeck Chamber Music Festival, and several local choirs have held concerts in the church during 2023. Also, St Mary's was one of the venues for the 2023 Purbeck Film Festival.

Pastoral care has continued, with changes. In the Spring, the Revd. John Staples retired from the Pastoral Care Team and we wish to express our gratitude for all the pastoral care and co-ordination he has carried out over the years. In early summer most of the lay team attended the Lay Pastoral Assistants' Course (see below). The team reformed in the late Autumn and plans to meet monthly to review pastoral requests. During the year those requesting prayer were prayed for in Morning Prayer and Sunday services at St. Mary's. Home Communion continued to those housebound. The Pastoral Team provides a chaplaincy function for the 15-bed Swanage Hospital.

T-Pot has continued to meet every Wednesday morning, co-ordinated by Mary Bevis and her volunteers. This group provides refreshments and fellowship and meets informally in the Rectory Classroom, a small hall by the church. It welcomes up to 40 both regular and occasional visitors and is highly valued by many who enjoy social time together. It is especially supportive to the elderly, bereaved, and depressed and has become an important mutually supportive group.

### **St Mark's:**

St Mark's was built for the Herston community in the mid nineteenth century, using local Purbeck stone from the quarries which provided a livelihood for many local families. The regular congregation includes many lifelong members and a strong bond continues between church and the community of Herston.

St Mark's celebrated its 150<sup>th</sup> anniversary in April 2022, with a service led by the Bishop of Sherborne. This anniversary was the impetus for a series of community events which continued into 2023. The emphasis of these events has been re-connecting with the local community. Events have been accompanied by a significant increase in publicity. In April 2022, the Revd David Richards was commissioned as Resident Priest at St Mark's. David lives within the Herston community.

Worship follows Common Worship and includes Holy Communion on all but one Sunday per month. The Choir was re-formed in April 2022, and the repertoire of music continues to be extended with a small band sharing in leading the service. On the last Sunday of each month there is the monthly **Celebration** Service – with a less formal approach and a deliberate attempt to reach out to families in the community. There is a strong emphasis on fellowship, with a time for refreshments after every service, and regular celebrations of special events. The church has a weekly prayer meeting and a fortnightly Bible study. St. Mark's Church has its own Facebook page, which is used to promote events, and has a page on the Team website.

Re-establishing the special relationship between Church and St Mark's CE Primary School, following the disruption of Covid, has been a major emphasis this year. A full report of work with schools is contained elsewhere in the report. The Resident Priest leads regular Assemblies at the School. The church continues to embrace the Salisbury Diocesan Board of Education initiative PRAY, BAKE, READ by praying regularly for our church school, and baking cakes for staff each term. Carol Richards was appointed as a Foundation Governor in 2022. Liz Fielder and Judith Bird were appointed as Foundation Governors in 2023.

Plans for a partial reordering of the Church and a refurbishment of the Church Room, to improve community facilities, are underway.

The pastoral needs of the community are met by lay and ordained members of the church.

## All Saints

All Saints Church continues to be a strong community of like-minded Christians; committed to one another and to the church's strapline of *living, loving and serving together*.

Our Bible verse for 2023 came from the first two verses of Psalm 67 '*May God be gracious to us and bless us and make his face shine upon us – so that your ways may be known on earth, your salvation among all nations*'. And indeed, looking back, we have experienced the blessing of God, both corporately and individually as many people shared at our final service of 2023.

During the year, we continued to meet in 3 congregations every Sunday morning: 8am communion service (a simple Common Worship service), Breakfast@9 (an interactive all age service with a croissant breakfast and craft) and the 10:30am service (a more contemporary style with monthly communion) with the introduction of a fortnightly evening time of informal worship which has been much appreciated by some. Many members of the church also participate in 5 house groups for midweek fellowship, bible study and prayer, meeting on a weekly or fortnightly basis. Over the summer we felt it right to stop the online prayer meeting which had started to support the vacancy, and in September we restarted a weekly prayer meeting on Thursday mornings.

July 6<sup>th</sup> saw the licensing and installation of Rev'd Joanna Levasier as the new team vicar and deanery schools missionary by Bishop Karen. This was a long-awaited moment which we were pleased to be able to share with a congregation from across the team as well as guests from further afield. We welcomed the junior choir from St Mary's to share in leading the musical worship as well as a band drawn from the All Saint's congregation.



Another highlight for the church family was in September down at the sea when we were overjoyed to be able to baptise two church members and also reaffirm, with immersion, the vows of two others in the sea.

We have enjoyed some good social times together; including church picnics on the May Coronation weekend and in August, and a team Harvest Lunch in the church, where we were very pleased to welcome members of St Mary's and St Mark's for lunch and games.

The All Saints' family has continued to invest in several Mission Partnerships both at home and overseas, with financial gifts, prayers, and where possible practical support and visits. We were pleased to welcome Sharon Prior from Studland Camps, Urban Saints to bring us an update in August and Ember Liddiard of YFC in Botswana, visited in November. We also continued our financial support to CMS for Daniel & Sarah Medeiros in Brazil, and the work of Tearfund and the Bible Society.

The second half of the year has seen a strengthening of numbers in our 8am and 10.30am services, along with monthly all age services, combining Breakfast@9 and the 10.30am services. In December we decided to trial Café Church at 10.30am (rather than combining for Breakfast@10) and this is the pattern that we will continue into 2024. We also introduced a new event at Christmas. Community Carols – a more informal café-style event with drama, readings, carols and , mince pies and mulled wine. We were pleased that the church was full and we will have to work out how to build on this in 2024.

Special mention needs to be made of all the amazing volunteers who have worked tirelessly to support the ministry of the church during the three year vacancy. In particular, thanks go to Tim and Sally Silk for their work with Breakfast@9 and the 10.30am service, as well to Rev'd Margaret Williams for faithfully investing in the 8am Communion service, and the outgoing church wardens, Claire Head and Michael Campbell.

As we move into 2024, we are taking time to work out where God is calling us in this new phase of our church life and are looking forward to "Making Jesus known" (our Diocesan strapline) together with those at St Mary's and St Mark's in the coming year.

### **Schools Ministry across the Team**

The team continues to have strong links with St Mark's CE Primary School with three church members now acting as the Foundation Governors responsible for Christian Distinctiveness: Carol Richards (St Mark's) continues as a Governor, extra focus - Community Links, Judith Bird (St Mary's) started in 2023 with extra focus on SEND and Liz Fielder (St Mary's) also started in 2023 with special focus on SIAMS.

The Revd. Dave and Carol Richards, based at St Mark's church, have worked hard to strengthen these connections, taking over leadership of weekly Monday Collective Worship, using the Roots and Fruits material; focusing on different Christian Values every half term.

Year 3 pupils visited St Mark's Church in March for a tour of the building, with particular learning about the Last Supper and Holy Communion. School services (for KS1 and KS2 separately to allow parents to attend) were held in church or school (weather dependent!) for Easter and Harvest, with Christingle services and a Carol Service at Christmas.

On the last Sunday in April St Mark's Day was celebrated jointly by the Church and School. There are plans to expand this service to a School reunion in 2024. David Richards also took part in the School Leavers Assembly at the end of the summer term and presented each leavers with a Scripture Union book to help their transition to Secondary School. (Leavers' Bibles were provided by King Charles, to celebrate the Coronation, in 2023).

A Quiz Night, organised by St Mark's Church in February, raised £500 towards extra-curricular activities at the school. Audrey Pembroke, a St Mark's Church member visited the School in September to teach Year 3 children about the History of Herston. Members of St Mark's also supported the School Fete in July, the Open Day in October and the School Christmas Fayre in December. Carol Richards organised a joint Church and School Christmas Tree for the Purbeck Christmas Tree Festival, with children from the school making the decorations and decorating the tree.

During the Autumn term, members of All Saints church were invited to go into the Reception-Year 1 class on a weekly basis to read Bible stories to the children. After a successful trial this programme is continuing into 2024, expanding to include older children.

St Mark's Church continues to embrace the Salisbury Diocesan Board of Education initiative PRAY, BAKE, READ by praying regularly for our church school, and baking cakes for staff each term.

As in previous years other members of the clergy from within the team have been involved in a local ecumenical school assembly rota; going into St Mark's CE Primary School, Corfe Castle CE Primary School and St Mary's Roman Catholic Primary School approximately twice a term, in rotation with other local church leaders. Ian Bird and Joanna Levasier have both been part of this cross-church partnership which is expanding to include other local primary schools in 2024. As part of this group, we were pleased to be able to support Corfe Castle in their SIAMS inspection in October 2023, demonstrating the good school-church connections in the deanery.

Open the Book is a national program run by the Bible Society, supporting teams going in to primary schools to present Bible stories as part of the collective worship programme. In 2023 the Swanage Open the Book team, which has members from St Mary's and All Saints as well as from other local churches, went into 4 local primary schools twice a term.

Our connections with other local schools strengthened, with Ian Bird and St Mary's Church being very pleased to be able to welcome Swanage Primary School to celebrate Christmas; running both a Christingle service for the whole school and hosting the school Carol Service for KS2 and their parents. Joanna Levasier and All Saints also hosted St Mary's RC primary school at Christmas for the first time; holding a Christingle Service for Year 3, the choir and parents. During the vacancy at Corfe Castle, Joanna Levasier has also been able support Corfe Castle Primary School with their Christmas services, running both a Christingle in the school and the carol service at St Edwards Church.

### **Pastoral Training**

In early summer 2023, we organised and ran a Lay Pastoral Assistants' (LPAs) Course in conjunction with The West Purbeck Benefice. The course was led by the Team Rector and The Revd. Canon Richard Bartlett, Vicar of the West Purbeck Benefice. 12 people attended the course, six of whom were from the Team and all enjoyed the training. The course attendees were commissioned by Bishop Karen in October 2023 at a joint service held in Wool. We now have six more LPAs in the Team for pastoral work. We are planning to run the course again and hope to develop a series of courses within the Team to equip people further in various areas of ministry.

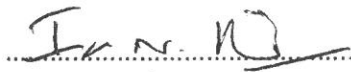
## Community Engagement

Many members of our congregations are involved in various organisations in Swanage that work in our wider community to support others. These organisations include The Swanage Foodbank, Communicare, Besom, Link Visiting Swanage, Purbeck Connect Ukraine and Christians Against Poverty.

### Our church volunteers

The PCC is grateful for the hard work of all our volunteers across the three Parish churches who make our churches the welcoming and caring places that they are. The PCC is very grateful too for the great support given by the retired clergy in the parish.

Approved by the Trustees and signed on their behalf by:



Date: 19<sup>th</sup> March 2024

## Independent Examiner's Report to the Parochial Church Council of the Ecclesiastical Parish of Swanage

I report to the trustees on my examination of the accounts of the above charity ("the charity") for the year ended 31<sup>st</sup> December 2023.

### Respective responsibilities

The charity's trustees are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

### Independent Examiner's statement

The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of The Chartered Institute of Management Accountants.

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 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.

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.

Date: 21 March 2024  
David E. Tyrrell

Mr David Tyrrell FCMA  
Flat 5  
Melsan Court  
13 Park Road  
Swanage  
Dorset  
BH19 2AA



## Statement of Financial Activities for the Year Ended 31 December 2023

		Unrestricted Funds	Restricted Funds	Endowment Funds	Total Funds 2023	Total Funds 2022
Note		£	£	£	£	£
<b>Incoming resources</b>						
Incoming resources from generated funds						
	2	207,191	36,816	-	244,008	220,079
		-	111,334	-	111,334	1,500
	3	41,363	-	-	41,363	32,609
	4	745	3,535	6,399	10,679	10,676
Total incoming resources		249,299	151,685	6,399	407,383	264,865
<b>Resources expended</b>						
Charitable activities	5	317,253	42,784	-	360,036	327,118
Total resources expended		317,253	42,784	-	360,036	327,118
Net incoming/ (outgoing) resources before transfers		(67,954)	108,901	6,399	47,347	(62,253)
<b>Transfers</b>						
Gross transfer between funds		39,708	(36,009)	(3,699)	-	-
Net incoming/ (outgoing) resources before other recognised gains and losses		(28,246)	72,893	2,700	47,347	(62,253)
<b>Other recognised gains and losses</b>						
Gains/(losses) on investment assets		1,245	9,238	6,619	17,102	(41,134)
Net movement in funds		(27,001)	82,130	9,319	64,449	(103,387)
<b>Reconciliation of funds</b>						
Total funds brought forward	10,11	57,738	175,158	184,104	417,001	520,389
Total funds carried forward	10,11	30,738	257,289	193,423	481,449	417,001

The Parochial Church Council of the Ecclesiastical Parish of Swanage

Balance Sheet as at 31 December 2023

	Note	2023 £	£	2022 £	£
<b>Fixed Assets</b>					
Investments	9		323,012		305,911
<b>Current Assets</b>					
Cash at bank and in hand		164,157		113,493	
		<u>164,157</u>		<u>113,493</u>	
<b>Creditors: Amounts falling due within one year</b>					
		<u>(5,720)</u>		<u>(2,401)</u>	
<b>Net current assets</b>			<u>158,437</u>		<u>111,091</u>
<b>Net assets</b>			<u><u>481,449</u></u>		<u><u>417,001</u></u>
<b>The funds of the charity:</b>					
Endowment funds	10, 11		193,423		184,104
Restricted funds	10, 11		257,289		175,158
<b>Unrestricted funds</b>					
Designated	10, 11	66,982		94,312	
General	10, 11	<u>(36,244)</u>		<u>(36,573)</u>	
<b>Total Unrestricted</b>			<u>30,738</u>		<u>57,739</u>
<b>Total charity funds</b>	10, 11		<u><u>481,449</u></u>		<u><u>417,001</u></u>

Approved by the Trustees and signed on their behalf by:

IAN N. BIRD.  
(print name)

Date: 19 March 2024

**Notes to the Financial Statements for the Year Ended 31 December 2023**

**1 Accounting policies**

**Basis of preparation**

The Parochial Church Council (PCC) is a public benefit entity within the meaning of Financial Reporting Standard (FRS) 102. The financial statements have been prepared under the Charities Act 2011 and in accordance with the Church Accounting Regulations 2006 governing the individual accounts of PCCs, and with the Regulations' "true and fair view" provisions, together with FRS102 (2016) as the applicable accounting standards and the 2016 version of the Statement of Recommended Practice: Accounting and Reporting by Charities issued March 2005 (SORP (FRS102)).

The financial statements have been prepared under the historical cost convention except for the valuation of investment assets, which are shown at market value.

**Funds**

General funds represent the funds of the PCC that are not subject to any restrictions regarding their use and are available for application on the general purposes of the PCC.

Designated funds are a part of unrestricted funds which the PCC have set aside or earmarked to be used for a particular purpose.

Restricted funds are those funds that the PCC are obliged to spend only on the particular purposes set out by the donor.

Endowment funds are another form of Restricted fund where the capital money given to the PCC comes with the specific instruction that only the income gained from investing the money can be spent.

**Income**

Income is recognised in the Statement of Financial Activities (SOFA) when the PCC becomes legally entitled to the use of the resources.

Grants and donations and their associated Gift Aid or other tax claims are included in the SOFA when any pre-conditions preventing their use by the PCC have been met. This is when the funds are received.

Income raised from events is reported gross in the SOFA - i.e. before any related costs that may have been deducted from the gross proceeds.

Investment income is included in the accounts when receivable.

Any gain or loss on the sale of investments and any gain or loss resulting from revaluing investments to fair value is included at the end of the year.

**Expenditure and liabilities**

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities and services for its beneficiaries. It includes both costs that can be allocated directly to such activities and those costs of an indirect nature necessary to support them.

Liabilities are recognised as soon as there is a legal or constructive obligation and settlement is probable and quantifiable.

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category.

**Governance costs**

Governance costs include costs of the preparation and examination of the statutory accounts, the costs of trustee meetings and the cost of any legal advice to trustees on governance or constitutional matters.

Notes to the Financial Statements for the Year Ended 31 December 2023

.....continued

**2 Voluntary income**

	Unrestricted Funds	Restricted Funds	Endowment Funds	Total Funds 2023	Total Funds 2022
	£	£	£	£	£
Planned giving	129,103	19,788	-	148,892	150,328
Legacies	-	111,334	-	111,334	1,500
Collections and appeals	44,059	12,678	-	56,737	35,488
Gift Aid tax reclaimed	34,029	4,350	-	38,379	34,262
	207,191	148,150	-	355,342	221,579

**3 Other income**

	Unrestricted Funds	Restricted Funds	Endowment Funds	Total Funds 2023	Total Funds 2022
	£	£	£	£	£
Wedding and funeral fees	15,990	-	-	15,990	12,999
Hire income	11,391	-	-	11,391	10,571
Church events	465	-	-	465	2,248
Magazine fees and donations	4,674	-	-	4,674	4,408
Other income	8,844	-	-	8,844	2,383
	41,363	-	-	41,363	32,609

Other Income includes some of the monies received from Studland PCC as described in note 8. It also includes income from solar panels at All Saints, insurance claims and other miscellaneous income.

Magazine fees also includes monies received from Studland PCC.

**4 Investment income**

	Unrestricted Funds	Restricted Funds	Endowment Funds	Total Funds 2023	Total Funds 2022
	£	£	£	£	£
Income from investments (see note 9)	517	3,535	6,399	10,451	10,513
Interest on cash deposits	228	-	-	228	163
	745	3,535	6,399	10,679	10,676

**5 Analysis of Church activities**

	Cost of church activities			
	Unrestricted Funds	Restricted Funds	Total Funds 2023	Total Funds 2022
	£	£	£	£
Fundraising costs	615	-	615	356
Publicity costs	399	-	399	950
Diocesan share	135,115	-	135,115	150,500
Employment costs (see note 7)	62,453	-	62,453	60,858
Utility costs	29,772	-	29,772	13,645
Insurance	11,645	-	11,645	10,587
Music	17,310	35,405	52,715	48,505
Repairs and Maintenance	23,188	-	23,188	14,422
Church refurbishments	415	4,244	4,659	1,763
Office expenses	11,592	-	11,592	6,316
Missionary and Charitable Giving	2,884	3,135	6,019	6,550
Other running costs	9,893	-	9,893	3,586
Funeral/ wedding costs and fees	8,307	-	8,307	6,902
Clergy expenses (see note 6)	3,190	-	3,190	1,884
Bank charges	474	-	474	294
	317,253	42,784	360,036	327,118

Notes to the Financial Statements for the Year Ended 31 December 2023

.....continued

## 6 Payments to PCC members

No trustee received any remuneration during the year for serving as a trustee of the charity.

The Rector, Team Vicar and Youth Minister received payments for expenses necessarily incurred in undertaking their roles. One other trustee received remuneration for services (verger) provided to the charity.

	2023	2022
	£	£
Clergy expenses	3,190	1,884
Trustee remuneration for services provided to the charity	40	-
	<u>3,230</u>	<u>1,884</u>

The £3190 in clergy expenses is included in Clergy Costs in note 5. The £40 in trustee remuneration is included in Funeral costs in note 5.

## 7 Employees' remuneration

The aggregate payroll costs of the employees were as follows:

	2023	2022
	£	£
Wages and salaries	57,515	56,368
Pension Contributions	4,938	4,489
Social security	-	-
	<u>62,453</u>	<u>60,858</u>

No employee received payments of more than £60,000 during the year 2023 (nor in 2022)

Average number of employees during the year = 4.0 (FTE = 2.1) (2022: 4.0; FTE 2.1)

This £62453 in payroll costs is included in Employment costs in note 5

## 8 Related parties

The PCC is an unincorporated charity and as such control is vested in the members of the PCC as trustees of the Charity.

The charity is controlled by the trustees.

The Team Rector is chair of both Swanage PCC and Studland PCC.

In 2023 £7575 was received from Studland PCC for:

- services (e.g. printing) provided by Swanage PCC to Studland PCC;
- a contribution to parish office expenses;
- a contribution to the Team Rector's expenses; and,
- a contribution to the Youth Minister's salary

£3,575 of this income is included in Other Income and Magazine Fees in note 3 and £4,000 in Planned Giving in note 2.

## 9 Fixed assets - investments

### Market Value

As at 31 December 2022	305,911
Revaluation	17,102
Additions	-
Disposals	-
As at 31 December 2023	<u>323,012</u>

All investment assets were held in the UK and invested in specific Church of England funds managed by Income received from these investment assets is recorded in note 4

## Notes to the Financial Statements for the Year Ended 31 December 2023

.....continued

## 10 Analysis of funds

	At 1 January 2023 £	Incoming resources £	Resources expended £	Transfers £	Other recognised gains/losses £	At 31 December 2023 £
<b>Unrestricted funds</b>						
Designated funds	94,312	12,004	(10,289)	(29,045)	-	66,982
General funds	(36,573)	237,294	(306,963)	68,753	1,245	(36,244)
Total Unrestricted funds	57,739	249,299	(317,253)	39,708	1,245	30,738
<b>Restricted Funds</b>						
Restricted fund	175,158	151,685	(42,784)	(36,009)	9,238	257,289
<b>Permanent Endowment funds</b>						
Endowment	184,104	6,399	-	(3,699)	6,619	193,423
	417,001	407,383	(360,036)	-	17,102	481,449

	At 31 December 2023	At 31 December 2022
<b>Balances on Designated funds</b>		
Stacey legacy	58,366	86,497
Various smaller funds	8,616	7,815
Total	66,982	94,312

	At 31 December 2023 £	At 31 December 2022 £
<b>Balances on Restricted funds</b>		
<b>St Mark's</b>		
Hallsworth legacy	76,225	88,891
Various smaller funds	953	727
Total St Mark's	77,178	89,617

	At 31 December 2023 £	At 31 December 2022 £
<b>St Mary's</b>		
Organ/ Music Fund	22,780	34,043
Director of Music	2,917	2,917
Various accumulated funds	46,003	45,991
Strickland legacy	100,000	-
Total St Mary's	171,700	45,991

	At 31 December 2023 £	At 31 December 2022 £
<b>All Saints'</b>		
Various accumulated funds	8,311	2,491
<b>PCC</b>	100	100
Total	257,289	175,158

The Parochial Church Council of the Ecclesiastical Parish of Swanage

Notes to the Financial Statements for the Year Ended 31 December 2023

.....note 10 continued

	At 31 December 2023	At 31 December 2022
<b>Balances on Endowment funds</b>		
<b>All Saints'</b>		
Bennett Legacy	56,996	60,722
Bennett Recoup	26,767	23,152
Ulwell Road	32,075	29,317
Total All Saints'	<u>115,838</u>	<u>113,191</u>
<b>St Mark's/ St Mary's</b>		
Cardew Legacy	77,585	70,913
Total	<u>193,423</u>	<u>184,104</u>

**11 Net assets by fund**

	Unrestricted Funds £	Restricted Funds £	Endowment Funds £	Total Funds 2023 £	Total Funds 2022 £
Investments	31,615	107,425	183,973	323,012	305,911
Net current assets	(877)	149,864	9,450	158,437	111,091
Net assets	<u>30,738</u>	<u>257,289</u>	<u>193,423</u>	<u>481,449</u>	<u>417,001</u>

