



Holy Trinity Church, Main Road, Bolton-le-Sands. LA5 8DU
St Mark's Church, Main Road, Nether Kellet. LA6 1ER

Reg. Charity No. 1144401

Financial Accounts & Report for the Year Ending 31 December 2022

Treasurer: Andy Hampshire. Independent Examiner: Elizabeth Bateman

Approved by Bolton-le-Sands Parochial Church Council on 21 March 2023 and signed on its behalf by Peter Hamborg (Chairperson of the PCC)

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Our vicar, The Reverend Peter Hamborg, has recorded a video introduction to this year's Annual Report. This can be found on the Holy Trinity website, www.boltonlesands.org.uk/official-notices-and-documents/ (look in Report & Accounts for 2022)

Or via the following QR code



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2022 Report and Accounts for the Parochial Church Council of Holy Trinity Church, Bolton le Sands and St Mark's Nether Kellett

Aim and purposes

Holy Trinity Parochial Church Council (PCC) has the responsibility of cooperating with the incumbent in promoting in the ecclesiastical parish, the whole mission of the Church, pastoral, evangelistic, social and ecumenical. The PCC is also specifically responsible for the maintenance of the Holy Trinity and St Mark's Churches.

Objectives and Activities

The PCC is committed to enabling as many people as possible to worship at our church and to become part of our parish community at Holy Trinity and St Mark's. The PCC maintains an overview of worship throughout the parish and makes suggestions on how our services can involve the many groups that live within our parish. Our services and worship put faith into practice through prayer and scripture, music and sacrament.

When planning our activities for the year, we have considered the Charity Commission's guidance on public benefit and, in particular, the supplementary guidance on charities for the advancement of religion. In particular, we try to enable ordinary people to live out their faith as part of our parish community through:

□□Worship and prayer; learning about the Gospel; and developing their knowledge and trust in Jesus.

□□Provision of pastoral care for people living in the parish.

□□Missionary and outreach work.

To facilitate this work it is important that we maintain the fabric of the Church of Holy Trinity and St Mark's.

Structure, governance and management

The method of appointment of PCC members is set out in the Church Representation Rules. At Holy Trinity the membership of the PCC consists of the incumbent (our vicar), churchwardens, and members elected by those members of the congregation who are on the electoral roll of the church. All those who attend our services / members of the congregation are encouraged to register on the Electoral Roll and stand for election to the PCC.

The PCC members are responsible for making decisions on all matters of general concern and importance to the parish including deciding on how the funds of the PCC are to be spent.

PCC members who have served at any time from 1st January 2022 until the date this report are:

Ex Officio members:

Incumbent: The Reverend Peter Hamborg (Chairman) – from 24 April 2022

Wardens: Peter-John Davies, Mary Bunting

Elected members:

Ann Basham (Secretary)

Rob Daunt

Margaret Hutchinson

Russell Longton

David Bateman

Margaret Foster

Brian James

Robert Whittaker

Kathrine Brough

Andrew Hampshire (Treasurer)

Duncan Johnson

Andrew Williams

Electoral Roll 2022

The electoral roll at the end of 2022 stood at 134, unchanged from 2021.

Rob Daunt, Electoral Roll officer

Independent Examiner's Report to the Trustees of Bolton le Sands Parochial Church Council

I report on the accounts of the church for the year ended 31 December 2022 which are set out on pages 4 to 9.

Respective Responsibilities of Trustees and Examiner

The church's trustees are responsible for the preparation of the accounts. The church's trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act)) and that an independent examination is needed.

It is my responsibility to:

- Examine the accounts (under section 145 of the 2011 Act);
- To follow the procedures laid down in the General Directions given by the Charity Commissioners (under section 145(5)(b) of the 2011 Act); and
- To state 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 Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

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

1. gives me reasonable cause to believe that in any material respect the requirements to keep accounting records in accordance with section 130 of the 2011 Act, and to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act have not been met; or
2. in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Original signed 16/ 03 /2023

Elizabeth Bateman CPFA

1 Greenwood Crescent, Bolton le Sands, Carnforth LA5 8BE

**Parochial Church Council (PCC) of Holy Trinity, Bolton-Le-Sands & St Mark's
Nether Kellett**

Notes to the financial statements for the accounting year ending December 2022

1. Accounting policies

Basis of financial statements^[1]_{SEP}: The financial statements have been prepared under the Church Accounting Regulations 2006 in accordance with applicable accounting standards and the current Statement of Recommended Practice, Accounting and Reporting by Charities (SORP 2015).

The financial statements have been prepared under the historical cost convention except for investment assets, which are shown at market value. The financial statements include all transactions, assets and liabilities for which the PCC is responsible in law. They do not include the accounts of church groups that owe their main affiliation to another body, nor those that are informal gatherings of church members.

Fund accounting:

Endowment Funds are funds, the capital of which must be retained either permanently or at the PCC's discretion; the income derived from the endowment is to be used either as restricted or unrestricted income funds depending upon the purpose for which the endowment was established in the first place.

Restricted Funds comprise (a) income from endowments which is to be expended only on the restricted purposes intended by the donor, and (b) revenue donations or grants for a specific PCC activity intended by the donor. Where these funds have unspent balances, interest on their pooled investment is apportioned to the individual funds on an average balance basis.

Unrestricted Funds are income funds which are to be spent on the PCC's general purposes.

Designated funds are general funds set aside by the PCC for use in the future. Project funds are designated for particular projects for administration purposes only. Funds designated as invested in fixed assets for the PCC's own use are abated in line with those assets' annual depreciation charges in the SOFA. Designated funds remain unrestricted and the PCC will move any surplus to other general funds.

The accounts are prepared on a Receipts and Payments basis

Fixed assets: Consecrated and benefice property is not included in the accounts in accordance with s.10(2)(a) and (c) of the Charities Act 2011.

Investments are valued at market value at 31 December 2022

Bolton le Sands Holy Trinity
Statement of Financial Activities
For the period from 01 January 2022 to 31 December 2022

	Unrestricted funds	Designated funds	Restricted funds	Endowment funds	Total funds	Prior year total funds
Receipts						
Planned giving	44,098	—	772	—	44,870	40,924
Collections and other giving	7,700	—	—	—	7,700	3,670
Other voluntary receipts	10,497	11,574	52,438	—	74,509	19,216
Gift Aid recovered	13,591	—	—	—	13,591	11,818
Other receipts	—	241	30	—	271	30
Activities for generating funds	8,845	30	563	—	9,439	4,441
Investment Income	408	—	1,847	—	2,256	1,774
Receipts from church activities	9,723	—	—	—	9,723	7,635
Total income	94,864	11,846	55,651	—	162,362	89,512
Payments						
Cost of generating funds	1,671	—	546	—	2,217	1,485
Missionary and Charitable Giving	20	—	1,368	—	1,388	1,768
Parish Share	73,000	—	—	—	73,000	67,000
Clergy and Staffing costs	3,856	—	1,044	—	4,901	2,637
Church Running Expenses	11,867	5,105	2,894	—	19,867	13,555
Church Repairs & Maintenance	167	20,672	16,206	—	37,046	2,413
Total expenditure	90,582	25,777	22,060	—	138,419	88,859
Gains / losses on investment assets	—	—	(7,932)	—	(7,932)	8,681
Net income / (expenditure) resources before transfer	4,282	(13,931)	25,659	—	16,009	9,334
Transfers						
Gross transfers between funds - in	—	—	8,904	—	8,904	—
Gross transfers between funds - out	—	(723)	(248)	(7,932)	(8,904)	—
Other recognised gains / losses						
Net movement in funds	4,282	(14,655)	34,315	(7,932)	16,009	9,334
Reconciliation of funds						
Total funds brought forward	5,623	31,179	6,431	74,060	117,295	107,961
Total funds carried forward	9,905	16,524	40,747	66,128	133,305	117,295
Represented by						
Unrestricted						
General fund	9,905	—	—	—	9,905	5,623
Designated						
Capital Reserve	—	4,977	—	—	4,977	14,309
Communications Development	—	917	—	—	917	1,721
Graveyard Designated Fund	—	10,629	—	—	10,629	14,399
Project Fund	—	—	—	—	—	750
Restricted						
100 Club Prize Fund	—	—	112	—	112	98
Agency collection	—	—	337	—	337	337
CBF and Diocese investment (use of School)	—	—	931	—	931	451
Choir Fund	—	—	474	—	474	474
Confirmation : Bible Fund	—	—	0	—	0	—
Discretionary Fund	—	—	63	—	63	883
Fabric Fund	—	—	34,404	—	34,404	249
Flower Fund	—	—	342	—	342	137
Graveyard Fund (Restricted)	—	—	152	—	152	617
Organ Fund	—	—	2,551	—	2,551	2,833
St Mark's Fabric	—	—	34	—	34	(5)

	Unrestricted funds	Designated funds	Restricted funds	Endowment funds	Total funds	Prior year total funds
St Mark's Toilet Fund	—	—	365	—	365	355
Thomas Robinson	—	—	723	—	723	—
Tower clock	—	—	254	—	254	—
Endowment						
Legacy Funds for school	—	—	—	66,128	66,128	74,060

Bolton le Sands Holy Trinity
Income / expenditure comparative figures General account only
Selected period: 01 January 2021 to 31 December 2022

Description	01/01/2021-31/12/2021	01/01/2022-31/12/2022	Fund	Fund type
Income				
0101 - Standing order with Gift Aid	33,692.00	35,737.00	General	Unrestricted
0102 - Parish Giving Scheme (d/d)	—	790.00	General	Unrestricted
0105 - Regular Giving by cheque	300.00	200.00	General	Unrestricted
0120 - Charity Cheques	35.00	20.00	General	Unrestricted
0201 - Envelopes-planned giving	4,131.75	4,627.55	General	Unrestricted
0202 - Standing order, no Gift Aid	2,344.00	2,724.00	General	Unrestricted
0301 - Loose plate collections	1,814.66	5,030.79	General	Unrestricted
0302 - Plate Gift Aid (Pew envelopes)	1,187.54	2,086.17	General	Unrestricted
0310 - Loose plate collection-Occ.	241.78	373.71	General	Unrestricted
0315 - Gift Aid envelopes, occ. offices	426.75	209.92	General	Unrestricted
0410 - Giving through church boxes	1.00	—	General	Unrestricted
0502 - Donations/Gifts	8,847.93	3,497.87	General	Unrestricted
0504 - Donations; Text, Online,	7,084.38	1,164.33	General	Unrestricted
0505 - Donations - refreshments	162.26	2,585.66	General	Unrestricted
0601 - Tax recoverable on Gift Aid	11,818.30	13,591.14	General	Unrestricted
08A1 - Non-recurring one-off grants	—	3,249.16	General	Unrestricted
0915 - Fund Raising-Fetes, Sales etc.	2,900.14	6,241.53	General	Unrestricted
0918 - Sale of small items	1,161.00	1,573.00	General	Unrestricted
0921 - Hundred Club 65%	247.00	1,031.25	General	Unrestricted
1020 - Bank interest	14.91	408.35	General	Unrestricted
1101 - Fees: weddings & funerals	3,429.85	9,243.00	General	Unrestricted
1102 - Community Use of Church	222.00	480.00	General	Unrestricted
Totals	80,062.25	94,864.43		
Expenditure				
1730 - Costs of fetes & other events	581.78	400.52	General	Unrestricted
1732 - Cost of small items for sale	702.09	677.16	General	Unrestricted
1734 - Payment card/text commission	9.06	37.79	General	Unrestricted
1735 - Refreshments costs	158.00	556.05	General	Unrestricted
1870 - Secular charities	20.00	20.00	General	Unrestricted
1910 - Ministry parish share etc	67,000.00	73,000.00	General	Unrestricted
2002 - Gifts & Discretionary giving	413.73	33.00	General	Unrestricted
2060 - Organist	900.00	1,200.00	General	Unrestricted
2101 - Working expenses of	—	273.16	General	Unrestricted
2120 - Council tax (vicarage)	858.90	1,696.54	General	Unrestricted
2130 - Parsonage house expenses	266.97	500.04	General	Unrestricted
2150 - Vicar's telephone	171.43	153.52	General	Unrestricted
2170 - Education	9.90	—	General	Unrestricted
2301 - Church running - insurance	1,964.22	2,299.44	General	Unrestricted
2310 - Church office: phone,	571.45	364.44	General	Unrestricted
2330 - Church maintenance	—	44.40	General	Unrestricted
2331 - Cleaning	16.14	16.60	General	Unrestricted
2340 - Upkeep of services	1,261.08	2,607.88	General	Unrestricted
2343 - Replacement/New Equipment	193.92	167.62	General	Unrestricted
2345 - Under 18s	—	371.73	General	Unrestricted
2360 - Administration	757.45	1,164.82	General	Unrestricted
2370 - Visiting speakers / locums	26.00	—	General	Unrestricted
2401 - Church running - electric	1,454.58	1,246.18	General	Unrestricted
2410 - Church running - gas	2,465.91	2,415.98	General	Unrestricted
2420 - Church running - water	81.14	118.97	General	Unrestricted

Description	01/01/2021-31/12/2021	01/01/2022-31/12/2022	Fund	Fund type
2430 - St Mark's running	548.64	587.06	General	Unrestricted
2440 - St Mark's: Heat & light	340.18	629.50	General	Unrestricted
Totals	80,772.57	90,582.40		

Bolton le Sands Holy Trinity

Balance Sheet detailed

	As at 31/12/2022	As at 31/12/2021
Fixed assets		
5501: Shares-2 The Nook	60,674.04	68,546.42
5502: Shares-J I Hall Legacy	454.21	514.51
5503: Deposit 2 The Nook	5,000.00	5,000.00
Total Fixed assets	66,128.25	74,060.93
Current assets		
6501: Bank current account	7,225.67	14,019.65
6502: Nat West Graveyard Account	32.04	197.04
6503: Bank current account - 'Raise the Roof'	—	—
6505: Nat West Reserve Account	30,953.94	311.21
6510: CCLA (CBF) deposit account	28,934.36	28,558.74
6590: Cash account	120.85	147.85
Total Current assets	67,266.86	43,234.49
Liabilities		
6650: Unpresented cheques	—	—
6699: Agency collections	90.00	—
Z06: Wedding deposits	—	—
Total Liabilities	90.00	—
Net Asset surplus (deficit)	133,305.11	117,295.42
Reserves		
Excess / (deficit) to date	23,942.37	652.43
Z01: Starting balances	117,295.42	107,961.17
Z02: Other gains/(losses)	(7,932.68)	8,681.82
Z03: Gains and losses own use	—	—
Total Reserves	133,305.11	117,295.42

Represented by Funds

Unrestricted	9,905.24	5,623.21
Designated	16,524.51	31,179.83
Restricted	40,747.11	6,431.45
Endowment	66,128.25	74,060.93
Total	133,305.11	117,295.42

FINANCIAL REPORT for 2022

The early part of 2022 saw a gradual return to normality after the restrictions caused by anti-covid precautions. It was not until 13 February that we started enjoying coffee after services again, something that, to me, signified that the worst of the pandemic really was over.

All that we then needed was a new vicar, and Peter's induction on Sunday 24th April, brought the start of a new phase in the life of the Parish.

These, and many other events and issues, had their effects on the Parish finances but I am pleased to say that the majority were positive, with the balance sheet ending the year in a healthier position than it started.

Before I go on to have a more detailed look at the year in figures I would like, as ever, to thank all those who have helped to make my role as treasurer so much easier than it might otherwise have been. – Vicar, Wardens, Committee Chairs, those who count and collate the collections, and all those who work behind the scenes to keep things running.

Also, grateful thanks to Elizabeth Bateman for once again completing the Independent Examination of our accounts in such a professional way.

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Financial Review: Highlights summary

The following highlights will be expanded upon later in the report, but give a brief overview of significant items:-

- Unrestricted income up 18% to £94864.
- Unrestricted expenditure (excluding Parish Share) up 28% to £17582.
- Parish Share contribution increased by 9% to £73000.
- Parish Share 'paid in full' for sixth consecutive year, but after Diocesan grant of £6569
- General Reserve increased to £9905 after surplus for the year of £4282 on General account.
- Major repairs to Holy Trinity's tower completed at a cost of £34817
- Holy Trinity Fabric Reserve in very healthy position following receipt of a Legacy of £30000. Other legacies totaling £10099.89 were also received and credited to the Capital Reserve
- New Parish Giving Scheme introduced, with first members joining in July.
- £7856 raised for charities other than Holy Trinity (not shown in the accounts).

Detailed Financial Review

Receipts & Payments

A summary of the year's Receipts & Payments is given in the attached Statement of Financial Activities (SOFA). There then follows under the heading 'Income/Expenditure Comparative Figures', a more detailed look at how the figures for the General Account are made up. This covers the day-to-day running of the church and also gives the comparative figures for 2021. There was other income and expenditure through the various Designated and Restricted accounts, substantially so in relation to the repairs to the louvres in the tower at Holy Trinity, and more detail about these is covered later in the report. The third document is the Balance Sheet.

There is only one presentational change this year, in that there is a new income stream in Unrestricted Income – Parish Giving Scheme (code 0102), so that income from this source can be separately identified.

The following remarks expand upon the figures in the SOFA and in the Comparative Figures, in the order that they appear in those reports.

1. Unrestricted Receipts:

In 2022 unrestricted receipts went up by £14092 to £94864, an increase of 18%. There were a variety of reasons for this:

- **Planned Giving** increased by £3596 (9%) to £44098. The major part of Planned Giving is by standing order and these increased again this year, as did giving by weekly envelopes. New for 2022 was income from the Parish Giving Scheme. This is a centralised scheme developed by the Church of England nationally in an attempt to take the administrative burden of collecting regular payments, and associated Gift Aid, away from individual parishes. Our PCC decided to join the scheme early in 2022 and it is likely that standing order income will reduce in future years as new givers join the scheme and existing donors switch from standing order. Can I encourage everyone to do so, as it will save myself and David Bateman an enormous amount of work over the year.
- **Collections and Other Giving** unsurprisingly saw the biggest % increase (110%, £4030) to £7700 in 2022 as church services were severely curtailed in 2021 due to the pandemic restrictions
- **Other Voluntary Receipts** reduced by £5600 (-35%). In 2021 we made an appeal for additional income by way of 'one-off' donations as otherwise there would have been a shortfall of income at a particularly significant time in the life of the parish (the quest for a new vicar). The congregation responded most generously and in the absence of the need for a similar appeal in 2022 a reduction was to be expected. At the end of 2022 we also received an unexpected windfall in this category, by way of a grant of £3249 from The Church Commissioners, being our share of a £15M grant from central C of E funds to help parishes alleviate (some of) the additional costs of heating & lighting during the year. Without this our surplus for the year would have been much smaller.
- **Gift Aid** increased by almost £2000. The vast majority of gift aid is claimed for income received in the previous financial year, so the increased figure reflects higher regular giving and one-off donations in 2021 compared with 2020. In future, as Planned Giving migrates to the Parish Giving Scheme (see above) we will move to Gift Aid being received contemporaneously with income, to the benefit of cashflow.
- **Activities for generating funds** more than doubled to £8845 in 2022. This was in a large part due to the re-starting of social fundraising activities which had ceased during 'lockdown', but also to new initiatives by the social team such as the 100 Club, which saw income exceed £1000 during its first full year of operation.
- **Receipts from Church Activities** relates to 'official' activities in church where fees are charged – weddings, funerals, burials etc. The total of £9723 received in 2022 was £6072 higher than similar unrestricted income in 2021. However, the 2022 figure included £3022 that in previous years would have been credited to the Graveyard Reserve. The PCC has decided on a temporary change in its policy for this type of income, as the Designated Graveyard Reserve had accrued an excess balance. The situation will be reversed when that reserve falls to two years' average expenditure on maintenance of the graveyards, a situation which will probably not arise until 2024.

Before moving on to look at expenditure, I think that it is worth noting that the Parish facilitated fundraising for other charities totaling £7856 during the year. This was done in a variety of ways – by hosting events, concerts and by specific appeals such as for Ukraine and the Children’s Society. A full list is appended to this report. For regulatory reasons these funds do not pass through the Parish accounts.

2. Unrestricted Payments:

- **Cost of generating funds:** this figure relates to the fundraising activities noted above
- **Parish Share:** we were able to pay this in full for the sixth year running, although the ‘in full’ was only after a contribution from Diocesan Reserves which reduced the request by £6569. Over the six-year period these grants have totaled £71462, so again we must be grateful for The Diocese’ forbearance.
- **Clergy & staffing costs:** the £3856 expense in the General account was £1200 higher than in 2021 due mainly to changes in Council tax payable on the vicarage – we were exempt when the vicarage was empty during the interregnum in 2021. Other costs were also lower in that year due to the pandemic
- **Church running expenses:** costs of £11867 were £2397 (25%) higher than in 2021 and this can again be explained by the return to ‘normality’ following lower costs for things such as gas, electricity and consumables at both Holy Trinity and St Mark’s during ‘lockdowns’, when no-one came to church.
- **Church repairs & maintenance:** the negligible figure in general expenditure does not mean that no work was needed; far from it. We are fortunate that there has been enough money in other reserves not to have to rely on ‘ordinary’ income.

Reserves Policy

As noted above, we are fortunate to have sufficient Restricted and Designated reserves to cover normal repairs and maintenance to the fabric of Holy Trinity, so that these costs do not drain unrestricted income. Similarly, expenditure on maintenance of the graveyards is covered by income from burials. This is accounted for via the designated graveyard reserve.

The ‘Designated’ and ‘Restricted’ funds columns on the SOFA show the income and expenditure passing through these and other areas. Unlike 2021, there was substantial income and expenditure in some of these areas, details of which are given below.

The SOFA report lists a number of accumulated reserves under three different headings: Unrestricted, Designated and Restricted. I will cover relevant points in turn:-

- **Unrestricted: General Fund:** as noted above, most income is unrestricted and is used to pay the majority of costs, including Parish Share. To ensure that there is always enough cash available to cover fluctuations in cashflow, it is PCC policy to keep a minimum balance to cover two/three months’ normal expenditure, excluding Parish share, (currently equating to approximately £5000) in the General Reserve. There was an excess of income over expenditure on the General account in 2022 increasing this reserve to a healthy £9905 at the year-end. This has given the PCC confidence, going forward into 2023 to look to support the vicar by paying for a modest amount of part-time administrative support. This will help him to concentrate more fully on his mission in the Parish.
- **Designated: Capital Reserve:** it is PCC policy that any legacies received, where specific instructions are not given, are used for fabric expenditure, and this fund

consists of the balance of such receipts less any relevant expenditure. In 2022 there were two such legacies totaling £10100 and they were put to good use immediately, going part way to funding the major repairs to Holy Trinity's tower.

- **Designated: Graveyard fund:** as reported last year, from 2022 the PCC has suspended its policy of allocating fees from graveyard burials to this reserve, as the accumulated balance was, and is, more than sufficient for foreseeable needs. All such income in 2022 was allocated to the General account.
The balance is still sufficient to cover three or more years of expenditure on maintenance of the graveyards, although it should be noted that, at the year end, the City Council bill of £3065 for grass cutting was still awaited.
- **Restricted Funds:** there are a number of small Restricted funds where cash has been raised/donated for specific purposes in the past and there has been little movement in most of these during the year. There was, however, substantial income of £52438 in 'other voluntary receipts'. Almost £22000 of this came from grants obtained for the tower repairs from a number of different organisations and was credited to the Restricted Fabric Fund. We owe a debt of gratitude to Brian James, chair of our Fabric committee, for the work that he put in to secure these grants. Brian's job would have been a great deal easier had he known that towards the end of the year we would receive a substantial legacy of £30000, restricted to use on the fabric of Holy Trinity. The good news is that this money will be available to pay for any future works required at Holy Trinity.
The tower repairs cost a total of £34817 and this forms the bulk of the total £37046 for 'church repairs and maintenance' shown on the SOFA.

THE FUTURE

The Parish's accounts going forward into 2023 are sound, and the legacies received during 2022 mean that the potential problems caused by maintenance of Holy Trinity Church, a grade ii listed building many centuries old, will not need to rely on the General Fund for, hopefully, some years to come.

With no guaranteed income, the parish is reliant on the continuing generosity of its congregation both in terms of financial contribution and time/expertise so willingly given on a voluntary basis. In the knowledge that this generosity will likely grow rather than diminish, then if 2022 were to be repeated, on a 'like-for-like' basis with no increase in costs, I could for once be relatively relaxed about the future. However, it is all too clear that costs will not stay the same, with general inflation running at over 10% at the end of 2022. Whilst our own 'parish inflation rate' may not be quite this high, as our Parish Share will increase by only 5%, we will need to raise at least an extra £5/6000 just to stay still.

Additionally, at the start of 2023 the PCC decided that it would like to offer Peter our vicar some help by way of part-time administrative support, as we would like him to be able to devote a larger proportion of his time to his mission within the parish rather than be bogged down by an ever-increasing pile of paperwork. At the time of writing the exact level of support has not been established and it may therefore be that the surplus for 2022 will cover the cost for a year or so, but in the longer term this will add further to general expenditure.

So in conclusion, whilst there are challenges ahead, our finances provide a solid base for the vicar, PCC and congregation to be able to take the parish forward in its mission to 'raise the roof and open the door.'

Andy Hampshire, Treasurer Holy Trinity & St Marks

Church Wardens report.

2022 was in many ways a year of evolution, revolution, and adaptation as we navigated the year. It was a GOOD year, and it has been a joy reflecting on how individuals and the church family has grown spiritually and numerically.

By faith, perseverance, and working together we achieved much in the year. God was good to us. We 'did our bit,' and for sure He did His!

As a church community we have continued to be welcoming, adaptable and generous and it has been good gaining feedback for individuals who either come for one service visiting, for a short while or joined our community. It has been good hearing how welcoming we have been.

We can reflect on the year in two segments, pre and post Peter's induction.

We were grateful to all the clergy who led our services and in unique and individual ways opened our minds in new fresh and helpful ways with their preaching. It has been a great pleasure having them and we know we have all gained from them and without a shadow of a doubt they have enjoyed being with us. We have gained good friends. They see this church as a live, welcoming, compassionate church. You have received loads of complements!

Preparations for the induction service in April took time, and we are grateful for the army of helpers who helped organize prepare and participate in the service. It was a milestone event.

In 2020 the PCC set out what we called our 3 pillars, or foci, for the church and we continued to root these into the life of the church family life.

- a. Children's and young people's work
- b. Discipleship
- c. Pastoral care

They continue to be a 'work in progress;' but as we review the year, we can recognize that all the pillars have helped develop the church family life, and in the lives of individuals.

1. Church Services:

Well, the first service we should highlight is Peter's Induction service. It was one of the biggest congregations we had in church since covid struck and it was a joy welcoming people from other parishes as well as local clergy and officials. It was an uplifting service, with great fellowship and LOTS of tea and cake afterwards! We are sure you will agree with us that Peter has integrated into our community well and is making his mark. We often feel that he has been with us years not months.

The Sunday 10.30am services is still the key weekly service for many. It has been a pleasure seeing how God has been working in individual and the congregational life. That is so evident in the way people have adapted to different styles and types of services we have held, and how we have welcomed and embraced new people, young and older people and the energy, joy and friendship that has grown amongst many. We are grateful this is such a lively, uniquely welcoming, compassionate generous church community.

The Wednesday service has continued, with a faithful and growing congregation. It is also good to see a number of mothers from our Messy Church service who originally came to get the Ripley forms signed, continue to attend, and say how much they enjoy the peaceful atmosphere and fellowship.

The 2nd Sunday services has most definitely been appreciated by the increasing number of families who come regularly. Indeed, there were occasions this service drew more people than the 10.30am service. This is a unique congregation, and it is a joy seeing families worshipping together, joining in these contemporary services, and adding to the life of the church. We thank the small but faithful core group that are leading on this.

Monthly Messy Church Service. We want to thank all those who have helped with the planning, organizing, leading, and practically supporting this service, particularly thanking Jess Squires who leads and coordinates this service. It is amazing to see families queuing at the door waiting to come in. The energy and fun that happens during the activities is exceptional and we have heard parents say after the service that 'that song will be singing in my head all day now!' It is a joy seeing so many dads come to the service and participate in the activities. Some parents who went to church where 'children should be seen and not heard' have found comfort and indeed a rekindling of their faith through these services. We were recently told of a story of a nurse at Blackburn Royal Infirmary who was talking about her church and that there was nothing there for the children, and a colleague shared ... 'Go to Bolton le Sands they have amazing Messy Church services there!'

During the Advent/ Christmas period, there were numerous special services, including the Compassionate Friends service, Christingle, the carol service in the church, the carols in the church yard, the 4pm Crib service in church, and the reintroduction of Midnight Mass were all unique were unique, meaningful, and much appreciated.

As part of our Pillar or working with children and young people we have collaborated with Rev. Susan Seed from St Luke's Church in Slyne and have set up a monthly Sunday evening Youth meeting. This is an important meeting as we help support teenagers navigate their lives at a pivotal time.

Some other highlights include:

1. MU. We are grateful for the way Kath Lane; Chris Hampshire and the team work so hard with the MU meetings and for the pastoral support they give to so many in our community.
2. Men's Breakfast is going from strength to strength and means a great deal to those attending as they deepen friendship and fellowship
2. First Friday has continued to be a blessing. It is a joy seeing many different people taking on a role and the way so many people from outside the parish and indeed internationally are joining us. We even have someone from the USA and Madrid joining us on occasions.
3. House Groups have continued to anchor people over the year. It is a joy seeing how these groups nurture, care and support each other. We would love to see more house groups starting
4. We are grateful for the team who faithfully come early to set up the technology and run the zoom services, even when only one or two people attend. We know that a number of our faithful members would miss out without this service. Indeed, people have joined us from different continents and time zones. People's confidence has increased greatly.
5. The Christmas Fayre, although hard work was an exceptional weekend, and many came from the village and indeed other villages to see what was going on. It was a great way to spend time renewing and deepening friendships. The bacon butty session was well received! They ran out of food!
6. The Social team have organized concerts which has benefited charities, communities and indicated to so many the type of church we have. We have had a number of conversations with people saying, 'What a beautiful church this' or 'now I know the church is open during the week I shall pop in again.'
7. Aligned to that, can we thank everyone who faithfully opens and closes church each day. We know people value the ability to come in to be quiet, pray, cry, or gain inner refreshment. Please can we encourage you to pop in while you are walking through the village.
8. The Thomas Robinson Charity runs independently of church but is under the Trusteeship of the Vicar, Church Wardens and coopted members including David Bateman. The First Tuesday Hub has played an integral role in the parish, meeting the emotional, practical and companionship needs of many. The armchair exercises bring fun and stretching together! It aligns well to our third pillar of pastoral care.

We are grateful for the Prayers. Those who faithfully, individually and in small groups pray for the work of the parish. If we do not continue to pray for the work here, then we 'build on sand.' It is God's work we are doing and to do this we need to faithfully spend time with Him to know what we should be doing.

We thank the different groups have continued with such good work during the year:

1. The PCC members who steadfastly attended monthly meetings, discussed so many topics and have taken either a lead or supported on so many projects
2. The great work of the Building and Fabric group to maintain our lovely historic building
3. The Graveyard group. It is such a pleasure to see the grounds being transformed. We know many people who daily walk through the church value all this work. Photographs of the beautiful grounds have been circulated far and wide.
4. The Finance Team as they diligently work to ensure we can cover all our commitments.
5. The Welcome Team as they faithfully turn up to church early to prepare and welcome people in.
6. The Baptism team as they resolutely organized, welcomed, and supported families before, during and after the baptisms, sometimes in lively noisy services. It is fascinating that even when people have left the parish and come home for baptisms, they still call it their church. What has been rooted in their younger years still impacts on them. Personally, we are also amazed at how long families stay after the baptism services, looking around, pondering, and renewing friendships.
7. The groups that organized weddings and funerals and made sure these services ran efficiently and with care to support the families involved.
8. Ian Entwistle, Peter, the choir, the 'boys' band' and all who have enriched our services with their playing and led us in worship. Thank you.
9. The Coffee Mornings that took place that not only generated income for the church but enriched fellowship between attendees.

We want to recognize everyone who have showed Christ's love in so many ways in our community. Those who go out of their way to care for neighbours, friends, and keep 'an eye' on people and those who care and support those who have been or are ill or going through bereavement and other difficult times.

None of us know what 2023 will hold, but we have a faithful God, on whom we can trust and depend. Our responsibility is to work and collaborate with the Holy Spirit in the areas He is working.

St Paul in 1 Corinthians 12 uses the analogy of the body to describe how members of the church need to work together to be truly effective in sharing the gospel of Christ, care and value each other. Each of us has an important part to play. Just as the eye needs the ear to hear, so we need to continue to work collaboratively. Each of us has a unique part to play in Christ's church. Can we encourage you to prayerfully explore what your contribution might be, and then offer your time and talents in Jesus's service?

Thank you for all you do in Christ's name.

Mary Bunting and Peter John Davies.

Safeguarding report for APM for 2022

It is said that prevention is better than cure. That is certainly the case regarding safeguarding. The effects of abuse of any sort, whether it occurs when young or in older people can have devastating effects, which can be lifelong. Therefore it is imperative that the church not only complies with the guidance regarding safeguarding, including undertaking the relevant training, but that everyone remains alert to any signs of distress that may indicate possible abuse. Keeping church as a safe place is a vital part of our ministry and witness.

We are delighted to report that there have been no incidents that required reporting during the past year.

Both of us are stepping down from the role of Parish Safeguarding Officer (PSO) at the APM, due to other commitments, so there is an immediate need for one or two volunteers to undertake the role.

Mary Bunting, Kath Lane

Fabric committee report

Work completed in the report period:

Holy Trinity - bell tower louvre blades replaced and safety rope installed in stairwell. Heating controls upgraded. WIFI upgraded. The glass doors continued to be an issue which has been resolved by changing a detector.

The bells have been inspected with a view to ringing them for the coronation.

St Marks - cast iron gutters replaced with UPVC plastic. Heating controls upgraded.

Both quinquennial reports have been completed at our churches with the following issues identified for 2023-2024.

Holy Trinity - only one priority issue to patch-repair the lead flashing on the tower roof and renew the access door. This work will be completed within the next few weeks.

St Marks - only one priority issue to remove the buddleia from the left-hand side of the roof coping. There is a general concern regarding the damp in St Marks which is caused by poor windows and pointing.

Churchyards: Continue to be maintained through a contract with Lancaster City Council for seasonal grass cutting. This year saw the addition of handyman services provided very effectively by Darren Lambert.

Gardens: Our small band of willing gardeners keep the church gardens in splendid order with floral displays much admired by those passing through.

Cleaning: Each week four small but dedicated teams continue to keep Holy Trinity clean and fit to welcome all who attend its services/ activities. A major high level clean also takes place each year.

Social and Communications Group Annual Report 2023

For January - December 2022

POLICY.

1. To provide a programme of social events for the parish of Bolton le Sands.
2. To provide effective channels of communication about the activities of the parish.

Summary – Social Team Events 2022.

Date	Event
Monthly	Men's Breakfast
Quarterly	100 Club
Quarterly	Community Coffee Morning
28/1/22	Burns Night
Lent 22	Lenten Lunches
2/4/22	Diverse Voices Concert
10/4/22	Christian Passover Meal
29/4/22	Ladies of Note Concert
13/5/22	Carnforth Choral Society
18/5/22	Parish Quiz Night
2/10/22	Harvest Lunch
8/10/22	Family Barn Dance
20/11/22	Lacuna Upper Voice Choir Concert
2-4/12/22	Advent Fair
10/12/22	Carnforth Choral Society Concert
17/12/22	Lancaster Sings Christmas

Summary: Communications Team 2021 v 2022.

Social Media Reports:

Channel	2022	2021	Comment
Eletter Messenger			
Monthly	307	258	New Format Dec 22
The Link			
Email addresses	208	199	New Format Aug 22
Facebook			
Reach	22,000	9,000	New Team Oct 22
Followers	654	505	
	Website		
	2022	2021	
Visitors	4,023	17,680	
Page Views	15,330	32,950	
1 st Popular Page	Calendar	Covid Support	
2 nd Popular Page	Messenger	Messenger	
3 rd Popular Page	Contact	Contact	

General Comments etc.

Social Media Reports;

All our channels have shown a healthy improvement year on year. The website has seen a sharp fall. This is due to the effect of our activities during Covid in 2021 which has reduced dramatically in 2022.

Social Team

We have had an active and varied series of events organised by the Social Team and thanks must be given to them for all the work that they do. The number of people who came forward to help with the various events and activities was encouraging. Of particular interest is the involvement of the teenagers who were keen to do more. It was also interesting to see the involvement of the other churches.

The objectives for 2023 are;;

- 1) involve more people in taking on leadership roles with activities
- 2) develop the roles teenagers play in our social activities
- 3) expand the number of events encouraging members of the parish to organise their own events
- 4) establish solid relationships with the other churches in putting on and promoting joint social activities.

Communications Team

Looking at the statistics above it is obvious that we have a phenomenal capability for outreach through our social media and website. The secret with social media is having the right content giving out a consistent message.

We have also revamped our monthly “Messenger” newsletter and our weekly email “The Link” which has received a very positive response and is contributing to the increase of visitors to the website.

It is important that we;

- 1) keep providing content for Messenger posts on the website.
- 2) keep the calendar on the website accurate and up to date with as much information we have about events.
- 3) look for every occasion to get people's email addresses so we can be in touch with them.

Objectives for the communications team for 2023;

- 1) involve more people in the management of our website and social media
- 2) review the effectiveness of all our social media channels and website particularly looking at individual pages on the website to make them more appealing.
- 3) continue to grow the number of people that we communicate with in our church, in the parish of Bolton-le-Sands and in Nether Kellet.
- 4) build on the links between the churches in order to make them more effective in spreading the good news of Jesus.

Parish Online Office (Google Workspace)

This is proving to be a growing resource in the life of the parish. The more we encourage people to use it the better we will serve the needs of the church community now and in the future. It is a secure method for keeping our data safe and for sharing information.

GDPR;

We are currently compliant with all GDPR legislation.

FUNDRAISING

It costs about £2000 per week to run the Parish with a full time vicar and, as a charity, we rely on the generosity of our congregation and the local community. Nevertheless, as an outward looking Christian community, we also love to facilitate fundraising for other charities.

Below is a list of the sums raised with the help of Holy Trinity & St Mark's churches this year.

It will be updated on a regular basis, but please write in any other sums that you are aware of. Thank you.

2022

TOTAL:

£7,856.15

1	09-Jan	Mother's Union Relief Fund	£400.00
2	March	Ukraine appeal	£500.00
3	25-Mar	Linda's anniversary, for Motor Neurone Disease	£1,668.00
4	Lenten lunches	Morecambe Foodbank	£712.00
5	02-Apr	Cancer Care Concert	£570.00
6	24-Apr	Bishop's Ordination Fund	£336.50
7	Yr to date(7Dec)	Mother's Union 1st Wed. coffee mornings	£622.57
8	22-May	MU Strawberry Tea	£616.80
9	May-22	Christian Aid	£333.50
10	08-Jun	Lancaster Organ and F Piano concert	£150.00
11	22-Jun	MU Deanery Festival (Ukraine Appeal)	£229.85
	02-Sep	Pakistan Flood appeal	£304.90
12	17-Sep	Foodbank	£32.59
13	21-Sep	Foodbank (@ MU opening service)	£103.60
15	Oct	Children's Society	£800.00
16	Oct	Olive Branch, from St Marks Harvest	£21.00
17	Oct	MU for Bishop's Harvest Appeal	£102.50
18	Nov	British Legion Sale of Poppies	£62.34
19	20-Nov	Lacuna Upper Voice Choir	£130.00
20	02-Dec	Children's Society (Christingle)	£160.00
21			
22			
23			
24			
25	PLUS. We regularly collect items for the Morecambe Food Bank.		
26	145 Kg was donated after our Harvest appeal.		
27	PLUS. Nine bags of gifts/food/toiletries to Olive Branch Christmas Appeal.		
28			
29			
30			
31			
32			
33		20	