

The Alister Hardy Trust

Report of the Trustees

for the year 1 August 2022 to 31 July 2024

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The Alister Hardy Trust, RERC Room, The Library,
UWTSD Lampeter Campus, Lampeter SA48 7ED

Charity registration number 1164168

The Alister Hardy Trust

Report of the Trustees for the year 1 August 2022 to 31 July 2023

1. Charitable Object

The stated object of The Alister Hardy Trust is ‘to advance the education of the public in religious and spiritual experience, its nature, function, frequency and purport’. The Constitution identifies a specific power to promote research into religious and spiritual experience and to publish the useful results of such research for the public benefit.

2. Principal Activities

During the past year the Trustees have undertaken two principal tasks:

- preparation of a strategic plan for the coming five years, intended to ensure the most effective and sustainable delivery of the charitable object, and
- the undertaking of the first year of a project intended to secure the Trust’s principal assets, the archive of accounts of religious and spiritual experiences and the complementary archive of the research and operation of the Religious Experience Research Unit and of the Trust as a whole, and the related database of the accounts of religious and spiritual experiences, for research and study, leading to the sharing of the outcomes for public benefit.

At the same time, the continuing programme of events and other outreach has continued. The Trustees have taken particular account of enhanced public benefit in shaping the strategic plan.

The public have continued to benefit directly from access to the resources of the Trust’s website and that of the Religious Experience Research Centre at UWTSD (both giving access to publications available online), the Trust’s library, housed at UWTSD, Lampeter Campus. The public has benefited indirectly from the outcomes of research undertaken internationally into religious and spiritual experience derived from investigation of the Trust’s database of accounts of religious and spiritual experiences. While much of the public benefit is currently latent, the Trust has for the first time prepared a strategic plan intended to maximise the impact of its work on a sustainable basis, and has invested in the long-term preservation of the archives which offer the basis of future study and research.

An outline of the mission and the strategic aims for its delivery in the coming five years are set out in section 6 below (page 4).

3. Finance

The Trust's accounts show income of £15.8K and expenditure of £26.5K, resulting in a deficit of £10.7K. This is the last year in which the Trust's accounts will be presented in this format.

The expenditure can be categorised as follows:

Governance and Administration, £2.8K

Charitable Activities £6.4K;

Archive Conservation Project, £17.3K.

Recurrent income is derived principally from membership subscriptions and income from investments. Recurrent funds meet the ongoing costs of operation and charitable activities. The Archive Conservation Project is being funded from surplus recurrent income, cash reserves, occasional member donations and sale of investments, themselves largely built up from earlier member donations and legacies.

The investment policy is to balance income generation and capital growth. The investments are managed by Sue White of Walker Cripps. The value of the investments at the year-end was £299,935. They generated an income of £10.9K in the current year, which currently represents about two-thirds of recurrent income to fund Trust operation and charitable activities.

The accounts for the period August 2022 to July 2023 have been prepared as a separate document, which follows this report (pages 6–12).

4. Governance and Management

The Trust is a Charitable Incorporated Organisation. The Constitution (2016) is its governing document. Under the Constitution, the members appoint Trustees at the AGM.

The Trustees have managed the affairs of the Trust, assisted by the director of the Religious Experience Research Unit at UWTSD, the Alister Hardy Professor, associated with the World Religions and Education Research Unit at Bishop Grosseteste University, and a director of communications, paid a fee by the Trustees. The preparation of the strategic plan has been taken forward by three Trustees, in consultation with the whole Trustee body and other interested parties. A Trustee, acting as honorary archivist, has led the Archive Conservation Project. Another Trustee has acted as honorary treasurer.

5. Relationship with the Religious Experience Research Centre at the University of Wales Trinity St David (RERC at UWTSD)

The Trust has a formal agreement with UWTSD, last amended in 2013, and works in collaboration with the RERC based at the Lampeter Campus of UWTSD. UWTSD provides accommodation in the university library at Lampeter Campus for the Trust's archive and library, and its IT department hosts the database of accounts of religious and spiritual experiences. The Trust meets the costs of occasional archive assistance and supports the production of the RERU's *Journal for the Study of Religious Experience*.

6. Mission and Strategic Aims, 2023–2027

6.1. Mission

The mission of The Alister Hardy Trust is the exploration of religious and spiritual experiences. It fosters the research and study of personal accounts of individuals' own religious and spiritual experiences. The Trust shares the outcomes of such study to offer greater depth, richness and meaning to human life.

To fulfil this mission, the Trust seeks to

- i. sustain a research archive of individuals' personal accounts of their own religious and spiritual experiences;
- ii. maintain a research database of these accounts of religious and spiritual experiences to enable research and study;
- iii. draw together a network of researchers concerned to undertake the investigation and analysis of personal religious and spiritual experiences;
- iv. share the outcomes of research in order to encourage public engagement in the study of religious and spiritual experiences, and the enrichment of human life.

6.2. Aims in the years 2023–27

In seeking to deliver its mission, the Trustees have set aims that are attainable in the five-year period 2023–27, and which the Trust, as a small organisation, can sustain or further develop in the years that follow.

The Trust aims, within a sustainable business plan, to

- i. encourage best use of the existing archive of accounts of religious and spiritual experiences [RSEs] and related research by
 - a. conservation of the archive of accounts of RSEs and of past work of the AHT,
 - b. replacement of the related, now outdated, computer database of accounts of RSEs;
- ii. develop and implement a research approach specific to the Trust, focused on individuals' personal narratives of RSEs;
- iii. disseminate the outcomes of the research undertaken within four specific fields:
 - a. those researchers seeking to engage with a research approach addressed to such non-specialist expressions and reflections in particular,
 - b. those researchers engaged in the study and investigation of RSE in general,
 - c. those engaged in relevant teaching and learning at primary, secondary and tertiary levels,
 - d. interested members of the general public, with the intention of encouraging their engagement in the study of RSEs;
- iv. secure sufficient recurrent funds
 - a. to ensure suitable ongoing care and maintenance of the archive,
 - b. to maintain the database of accounts of RSEs
 - c. to support a sustainable programme of research and dissemination;
- v. enhance the identity and profile of the Trust, and the Alister Hardy 'brand';

- vi. streamline the governance and operation of the Trust for better impact, efficiency and economy;
- vii. seek better but less costly provision for non-specialist interests in religious and spiritual experience within the membership of the Trust and for wider public benefit.

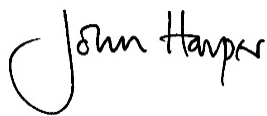
Progress in achieving these aims will be reviewed and refined annually by the Trustees.

7. Trustees

The following served as Trustees during the year:

The Revd Dr Tania ap Siôn
Andrew Burns
Dr Tom Farley
Dr Mark Fox (until 14 December 2022)
The Revd Canon Professor Leslie Francis (Chair)
John Franklin (until 14 December 2022)
Tanya Garland (until 14 December 2022)
Dr David Greenwood (Treasurer)
Professor John Harper (Vice Chair)
Dr David Rousseau
Mike Rush
The Revd Professor Andrew Village

This report and the accompanying accounts have been approved by the Trustees.



Prof John Harper
Vice Chair
On behalf of the Trustees of The Alister Hardy Trust

27 May 2024

THE ALISTER HARDY TRUST

ACCOUNTS

for the year ended 31 July 2023

Charity registration number 1164168

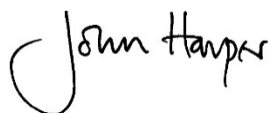
THE ALISTER HARDY TRUST
TRUSTEES' FINANCIAL REPORT FOR THE YEAR ENDED
31 JULY 2023

The Trustees have pleasure in presenting their Financial Report and Accounts for the year ended 31 July 2023.

FINANCIAL REVIEW

During the year, a total deficit of £10,669 arose. The notes to the accounts include additional information on financial performance.

The Trust is able to meet all its financial obligations.

A handwritten signature in black ink that reads "John Harper". The signature is written in a cursive style with a large initial 'J'.

Prof John Harper
Vice Chair, on behalf of the Trustees

THE ALISTER HARDY TRUST

Accountants' Report on the Unaudited Accounts

In accordance with your instructions we have compiled these unaudited accounts from the accounting records and information and explanations supplied to us.

Eryl Jones

Chartered Certified Accountant
12 Station Terrace
Llanybydder
Carmarthenshire SA40 9XX

THE ALISTER HARDY TRUST

Balance Sheet as at 31 July 2023

	2023		2022	
	£	£	£	£
Fixed Assets				
Tangible Assets		50,515		50,520
Current Assets				
Stock	460		481	
Debtors (note 6)	426		974	
HSBC Account - General Fund	-		24,898	
Lloyds Bank - General Fund	14,153		-	
UWL - AH Research Account	443		443	
WC Investment Account (note 5)	299,935		330,404	
	<u>315,417</u>		<u>357,200</u>	
Current Liabilities				
Creditors (note 1)	720		1,370	
Net Current Assets		<u>314,697</u>		<u>355,830</u>
Total Assets Less Current Liabilities		<u>365,212</u>		<u>406,350</u>
Capital Account				
Brought forward at 1 August 2022		406,350		418,599
General Funds Surplus/(Deficit)		(10,669)		6,566
Portfolio Appreciation (note 5)		(30,469)		(18,815)
		<u>365,212</u>		<u>406,350</u>

Approved by



Prof John Harper
Vice Chair, on behalf of the Trustees

THE ALISTER HARDY TRUST

Income and Expenditure Account for the year ended 31 July 2023

	2023		2022	
	£	£	£	£
Income				
Subscriptions		3,630		2,923
Gift Aid		426		454
Sale of Publications		41		18
Members Day		290		-
Donations (note 3)		600		5,225
Royalties		-		13
Investment Income (note 5)		10,879		10,542
Interest		2		-
		<u>15,868</u>		<u>19,175</u>
Cost of sales				
Opening Stock	481		490	
Closing Stock	<u>(460)</u>		<u>(481)</u>	
		21		9
Gross surplus		<u>15,847</u>		<u>19,166</u>
Administrative expenses				
Staff & Volunteers Expenses	638		552	
Trustees Meeting Costs	-		101	
Printing and Stationery (note 8)	2,530		1,793	
Subscriptions (note 9)	153		58	
Members Day	390		-	
Local UWTSD Conference	300		300	
Honorarium (note 10)	1,400		1,300	
Donations	-		346	
Accountancy Charges	720		720	
Professional Fees (note 4)	3,277		2,993	
Archive Project (note 11)	17,009		4,388	
Bank Charges	94		42	
Depreciation - Plant & Equipment	<u>5</u>		<u>7</u>	
		<u>(26,516)</u>		<u>(12,600)</u>
Net surplus/(deficit)		<u>(10,669)</u>		<u>6,566</u>

THE ALISTER HARDY TRUST

Schedule of Movements of Fixed Assets for the year ended 31 July 2023

	Art Works	Library Books	Computer equipment	Total
	£	£	£	£
Cost				
At 1 August 2022				
At 31 July 2023	4,000	46,500	602	51,102
Depreciation				
At 1 August 2022	-	-	582	582
Charge for the year	-	-	5	5
At 31 July 2023	-	-	587	587
Net Book Values				
At 31 July 2023	4,000	46,500	15	50,515
At 31 July 2022	4,000	46,500	20	50,520

THE ALISTER HARDY TRUST

NOTES TO ACCOUNTS

1. The creditor is the accountancy fee.
2. The provision of accommodation and some associated overheads by the UWTSD has not been charged and represents a significant saving on the cost that otherwise would have been incurred by the organisation.
3. No donations in excess of £1,000 were received during the year.
4. The following professional fees were paid:
 - i) £2,577 to Rankin Associates
 - ii) £700 to Prof Jeff Astley

The payment to Rankin Associates (Dr Marianne Rankins) covers administrative support, communication with the membership, and organisation and management of events.

The payment to Prof Jeff Astley was for providing advice on strategy and research.

5. During the year, investment income of £10,879 was received from Walker Crips.

The portfolio was valued at £299,935 at the year end which represented a decrease of £30,469 for the year.

6. The debtors figure relates to gift aid.
7. Any postage costs are included in staff & volunteers expenses.
8. Printing and stationery costs are paid to Oxford Brookes for the printing and postage of *De Numine*.
9. The subscription costs are for Zoom and the domain name.
10. The following honoraria were paid during the year:
 - i) £900 to Rhonda Riachi, for editing *De Numine*
 - ii) £500 to Billie Krstovic, for assisting the editor
11. The following payments were made for Archive Project:
 - i) £2,485 to Prof John Harper, for expenses only, including some archive materials
 - ii) £14,524 to Rachel Dowd, fees and expenses, including some archive materials