

Charity number: 1170492



**Perspectives on Systems, Souls and Society**

**Trustees' report and financial statements**

**For the year ended 31<sup>st</sup> December 2022**

**Perspectives on Systems, Souls and Society**  
**Annual Report**

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# Perspectives on Systems, Souls and Society Annual Report

## Legal and administrative information

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<b>Charity number</b>	1170492
<b>Principal address</b>	PO Box 75779 London SW15 9HW
<b>Trustees</b>	Mr Hans Tomas Bjorkman  Dr Jonathan Rowson  Mr Ian Christie
<b>Independent Examiner</b>	Ash & Associates Chartered Accountants First Floor 1A Leadenhall Market London EC3V 1LR
<b>Principal Bankers</b>	Lloyds Bank plc 25 Gresham Street London EC2V 7HN

# **Perspectives on Systems, Souls and Society Annual Report**

## **Report of the trustees For the year ended 31<sup>st</sup> December 2022**

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The trustees present their report and the financial statements for the year ended 31<sup>st</sup> December 2022. The trustees who served during the year and up to the date of this report are set out on page 1.

### **Structure, governance and management**

The charity is registered with the Charity Commission (Registration number 1170492) and constituted as a Charitable Incorporated Organisation. The charity is governed by its constitution dated 30<sup>th</sup> November 2016.

### **Objectives and activities**

The objects of the charity are to seek to advance education for public benefit through:

- a) The provision of materials and activities provided in the interest of promoting ecological sustainability, human development, and democratic engagement.
- b) Such materials and activities will be provided with the purpose of developing individual and collective capabilities to respond to complex societal problems

In meeting these objectives, the trustees have given due consideration to the guidance on Public Benefit issued by the Charity Commission.

### **Achievements and performance**

See the attached report from the CEO.

### **Financial review**

The charity received funds totalling £487,661 (2021 - £244,982) and incurred costs totalling £200,800 (2021 - £342,919). At the year end the funds held by the charity amounted to £450,104 (2021 - £163,243).

### **Reserves policy**

At present no specific reserves are maintained, this will be reviewed once the charity becomes more established and has secured further funding.

### **Statement of trustees' responsibilities**

The trustees are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The Law applicable to charities in England and Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of charity and of the incoming resources and application of resources of the charity for that year. In preparing these financial statements the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

## **Perspectives on Systems, Souls and Society Annual Report**

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011 and the Charity (Accounts and Reports) Regulations 2008. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

On behalf of the trustees

Dr Jonathan Rowson  
Trustee

18<sup>th</sup> April 2024

# Perspectives on Systems, Souls and Society Annual Report

## CEO's Report For the year ended 31<sup>st</sup> December 2022

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2022 proved to be a transformative year for Perspectiva.

After significant activity towards the end of 2021, including the publication of six books, the first few months were relatively quiet. In the first quarter, we prepared and published three essays as part of our essay series, starting with [\*Meeting our Worldviews\*](#) by Alexander Carabi. We also published two important essays by Perspectiva Associate Zachary Stein. The first is part of the intellectual foundation for our work on transformative education, [\*Education is the Metacrisis\*](#), and this foundational piece informs [\*Education must make history again. Remembering Comenius in a Time Between Worlds\*](#) where the idea that we are 'in a time between worlds' is more fully developed, with an illustration of a comparable historical moment. We also worked on book promotion and a range of fundraising meetings and scoping documents.

After a long gestation going back to 2019 and navigating through Covid with an online event and then a much smaller festival, June 2022 featured the first fully-fledged [\*Realisation festival\*](#), with almost a hundred people in attendance. Keynotes by Alastair Macintosh and Madeleine Bunting were highlights, as were the improvisation, artistic, and musical activities, but more generally it felt like the festival had properly established itself and looks set to remain in place. A community is beginning to form around the festival, and we expect that community to grow.

Much of the second and third quarters were dedicated to preparing material for an online educational offering that we intended to launch in 2022, but which was pushed back and evolved into a more ambitious plan due to subsequent developments. We developed an idea for 'Realisation 101' - an educational offering that combines 'getting real' in the sense of getting the world in perspective, realising what is happening, 'becoming real', in the sense of self-realization, and 'making real' in the sense of practically making ideas and plans manifest. Ivo Mensch especially worked on developing the practice strand of work that relates to 'becoming real', and many of the intellectual materials were channeled into a series of blog posts on Whatisemerging.com by Jonathan Rowson called "[\*Now that you've found the others, what are you going to do?\*](#)". This seven-part series served a dual purpose in informing the purpose of the Emerge gathering in Austin, Texas. (Emerge is a Perspectiva project).

The Austin Emerge gathering brought together around 250 people at the central library in downtown Austin in June of 2022. Many self-organised satellite events also happened around the main two days. It attracted mainly people from North America from the Austin region obviously with a strong representation from tech, but also from further away such as Canada. It was a place where networks of various kinds came together and explored possible collaboration across disciplines, but related to formulating responses to the interrelated crises. Concrete progress was made in the realm of network visualisation, making the network visible to itself, and finding the value in the connectivity between the various people in those networks. A big part of the event was the simple physical togetherness, as for many it was the

## **Perspectives on Systems, Souls and Society Annual Report**

first in-person event post-covid. And the fact that many people knew each other only from online before, so connections were deepened and strengthened. A good [critical reflection on the event](#) was written by Brendan Graham Dempsey.

Around the time that the Emerge event was underway, Perspectiva received encouraging news of successfully achieving a bridging grant from their main funder, The Fetzer Institute of \$400,000 USD to be used to build team capacity. We soon advertised for several positions and much of the rest of the year was focused on recruitment.

In September, Emerge and four other partner organisations received a grant from the EU Erasmus program. This was an outcome of a previous meeting held at the Emerge gathering in Berlin in 2021, where the partnership was born. The aim of the project, which will extend into 2025, is to identify conditions and affordances for developing coherence within communities seeking to affect social change. A big part of the project consists in the mapping of what can be called an emergent international subculture consisting of various organisations. Another focus is research into learning and developmental needs of the leaders active in the various organisations that make up the networks of focus. From this research, leadership learning journeys will be developed and distributed following an open-source ethos. The aim of the project is for the benefit of all EU citizens and the communities they are a part of. Emerge's role, as a media outlet and systems convener, is to be the link to the communities in the network. The main task is to produce 20 profiles of these leaders and publish several technical essays and the organisation of 3 in-person gatherings in the EU partner countries.

In November, we spent some time with Daniel Schmachtenberger while he was visiting the UK, and hosted a public event - [The Great Game of Power in the 21st Century](#) at St Ethelburgas that was sold out. We also discussed scope for collaboration between like-minded organisations in North America and Europe.

We continued to develop the theory and the practice of the [antidebate methodology](#) throughout these months.

By mid-December, we had recruited a new team, at that point of seven people in total, who met together for the first time in London in mid-December, prior to an antidebate session with about twenty-five people and a Christmas party that included a recorded open microphone session. I took the arrival of the new team as an opportunity to refresh the communication of the Perspectiva strategy, which is now much clearer, and makes it easier to clarify our purpose to funders and to the outside world.

With a clear strategy, and a new team in place, we ended the year excited to have established Perspectiva as a viable organisation with a great deal to look forward to in 2023 and beyond.

## **Perspectives on Systems, Souls and Society Annual Report**

### **Independent examiner's report to the trustees on the unaudited financial statements of Perspectives on Systems, Souls and Society.**

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We report on the accounts of Perspectives on Systems, Souls and Society for the period ended 31<sup>st</sup> December 2022 set out on page 7 to 10.

#### **Respective responsibilities of trustees and independent examiner**

As the charity's trustees you are responsible for the preparation of the accounts, you consider that the audit requirement of section 144 of the Charities Act 2011 (the Act) does not apply and that an independent examination is needed. It is our responsibility to examine the accounts under section 145 of the Act, to follow the procedures laid down in the General Directions given by the Charity Commission under section 145(5)(b) of the Act, and to state whether particular matters have come to our attention.

#### **Basis of independent examiner's statement**

Our 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 we do not express an audit opinion on the view given by the accounts.

#### **Independent examiner's statement**

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

- (i) which gives us reasonable cause to believe that in any material respect the requirements:
  - to keep proper accounting records in accordance with section 41 of the Act; and
  - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act have not been met; or
- (ii) to which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

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#### **Ash & Associates**

Chartered Accountants  
First Floor  
1A Leadenhall Market  
London  
EC3V 1LR

18<sup>th</sup> April 2024



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**Statement of financial activities  
For the year ended 31<sup>st</sup> December 2022**

	Notes	2022 £	2021 £
<b>INCOMING RESOURCES</b>			
Donations received		723	3,312
Grants received	2	433,109	220,976
Events		50,691	35,703
Publications		3,006	4,952
Bank interest		132	39
<b>Total incoming resources</b>		<b>487,661</b>	<b>264,982</b>
<b>RESOURCES EXPENDED</b>			
Office Rent		600	-
Staff costs	3	132,640	147,653
Consultants & researchers		12,932	90,405
Event Costs	4	41,151	67,197
Office & IT Costs		2,640	5,715
Publishing of materials		1,042	28,399
Advertising & marketing		3,491	-
Subscriptions		955	-
Travel expenses		1,451	-
Accountancy fees		2,430	2,250
Legal fees		1,020	763
Bank charges		481	537
Foreign exchange losses/(gains)		(33)	-
<b>Total resources expended</b>		<b>200,800</b>	<b>342,919</b>
<b>NET SURPLUS/(DEFICIT) FOR THE YEAR</b>		<b>286,861</b>	<b>(77,937)</b>
Total funds brought forward		163,243	241,180
<b>TOTAL FUNDS CARRIED FORWARD</b>		<b>450,104</b>	<b>163,243</b>

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**Balance sheet as at 31<sup>st</sup> December 2022**

		2022		2021	
	Notes	£	£	£	£
<b>FIXED ASSETS</b>					
Investment in subsidiary	5		23,289		23,289
<b>CURRENT ASSETS</b>					
Cash at bank and in hand			440,337		145,758
<b>CURRENT LIABILITIES</b>					
Accrued expenses		(3,780)		(1,980)	
Social security and other taxes		(9,742)		(3,824)	
			(13,522)		(5,804)
<b>NET ASSETS</b>			450,104		163,243
<b>FUNDS</b>					
Unrestricted fund			450,104		163,243
<b>TOTAL FUNDS</b>			450,104		163,243

The accounts were approved by the trustees on 18<sup>th</sup> April 2024 and signed on their behalf by:

Dr Jonathan Rowson  
Trustee

Mr Hans Tomas Bjorkman  
Trustee

Mr Ian Christie  
Trustee

# Perspectives on Systems, Souls and Society

## Annual Report

### Notes to the accounts

For the year ended 31<sup>st</sup> December 2022

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#### 1. Accounting policies

##### 1.1 Basis of accounting

The financial statements of the charity, which is a public benefit entity under FRS102 are prepared under the historical cost convention and in accordance with FRS102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland", "Accounting and Reporting by Charities" the Statement of Recommended Practice for charities applying FRS102 and the Charities Act 2011.

##### 1.2 Incoming resources

All incoming resources are included in the statement of financial activities when the charity is entitled to the income and the amount can be quantified with reasonable accuracy. The following specific policies are applied to particular categories of income:

- Voluntary income is received by way of grants, donations and gifts and is included in full in the statement of financial activities when receivable.
- Donated services and facilities are included at the value to the charity where this can be quantified. The value of services provided by volunteers has not been included.
- Income from investments is included in the year in which it is receivable.

##### 1.3 Resources expended

Expenditure is recognised on an accrual basis as a liability is incurred. Expenditure includes any VAT which cannot be fully recovered, and is reported as part of the expenditure to which it relates.

#### 2. Grants Received

	2022 £	2021 £
The John Templeton Foundation	-	158,625
The Fetzer Institute	335,740	51,551
The Society for the Study of Science and Religion	-	10,000
The JJ Charitable Trust	70,000	-
Inspiration Incubator	15,000	-
Shin Kong Life Foundation	10,000	-
Others	2,369	800
	<u>433,109</u>	<u>220,976</u>

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**For the year ended 31<sup>st</sup> December 2022**

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<b>3. Staff costs</b>	<b>2022</b>	<b>2021</b>
	<b>£</b>	<b>£</b>
Salaries	121,512	134,782
Social security	9,356	11,552
Pension contributions	1,321	1,319
Staff training	451	-
	<u>132,640</u>	<u>147,653</u>
Average number of employees:	<u>2.5</u>	<u>3</u>

<b>4. Event Costs</b>	<b>2022</b>	<b>2021</b>
	<b>£</b>	<b>£</b>
Realisation Festival	34,044	21,000
Emerge Network – Berlin	-	43,436
Emerge Network – Austin	2,261	-
Other events	4,846	2,761
	<u>41,151</u>	<u>67,197</u>

**5. Investment in subsidiary**

In 2020 the charity acquired *Cocreation.x gGmbH* a Berlin based non-profit making organisation, to make it easier to work with our European network, particularly in light of the impact of Brexit which may make it harder for organisations in the UK to raise funds within the EU.

**6. Related party transactions and trustees' expenses and remuneration**

During the year Dr Jonathan Rowson, was employed as the Charity's full time Director, and received remuneration of £68,513 (2021 - £67,125) and pension contributions of £1,321 (2021 - £1,319), as permitted by the Charity's constitution and approved by the remaining trustees.

The remaining trustees all give freely their time and expertise without any form of remuneration or other benefit in cash or kind (2021: £nil).