

THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF ST LUKE THE EVANGELIST YORK

England & Wales · Charity number 1185606

Details

Status Registered

Legal form Other

Registered 2019-10-03

Register [View on the Charity Commission register](#)

Contact

Address St Luke The Evangelist Church
Burton Stone Lane
York
YO30 6DG

Phone 07303 029811

Email vicar@stlukesyork.org

Website www.stlukesyork.org

Activities

Objects: PROMOTING IN THE ECCLESIASTICAL PARISH THE WHOLE MISSION OF THE CHURCH.

Activities: The PCC offers a range of services and events during the week and over the course of the year that our community find both beneficial and spiritually uplifting. St Luke's provides pastoral care across the parish in various ways. The introduction of 'joyful Connections', which takes place in the Church Hall, works towards combatting social isolation.

Classification

- **How:** Provides Human Resources, Provides Buildings/facilities/open Space, Provides Services
- **What:** Religious Activities
- **Who:** Children/young People, Elderly/old People, The General Public/mankind

Geography

- City Of York

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£135,247	£101,917	-	-
2023-12-31	£117,762	£102,458	-	-
2022-12-31	£106,972	£187,069	-	-
2021-12-31	£309,806	£107,087	-	-
2020-12-31	£109,037	£155,961	-	-

Trustees

Name	Role	Appointed
Rev Anika Gardiner	Chair	2024-09-02
Alfreda Alderson		1975-04-22
Christina Jane Pownall		2017-04-23
Christine Jo Holland		2025-05-18
David John Mazza		2026-05-24
David Robert Titterington-Cook		2026-05-24
Dr George Edward Clarke		2024-11-18
Dr Michael Herman Tyler		2025-05-18
Edwin Leonard Schofield		2022-04-03
Elizabeth Foster		2024-11-18
Gillian Mary Tyler		2008-07-12
Lynn Anne Comer		1979-06-24
Mark David Robinson		2026-05-24
REV MARGARET ELIZABETH CARRINGTON		2009-04-19
Rebecca Amy Dunn		2023-10-14
Roseleen Patricia Mazza		2026-05-24
Sally Christine Maybridge		2014-04-06
Stephen Michael Adams		2018-07-14
Thomas David Freeman		2025-05-18

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES



Trustees' Annual Report

for the period

1st January 2024 to 31st December 2024

Charity

**THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF
ST LUKE THE EVANGELIST YORK**

Charity Registration Number

1185606





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ADMINISTRATIVE INFORMATION

CONTACT INFORMATION

Address St Luke the Evangelist Church
Burton Stone Lane
YORK YO30 6DG

Phone No. 07584 551915

Email treasurer@stlukesyork.org

Website <https://www.stlukesyork.org>

CHARITY TRUSTEES

The charity's Trustees are the ex officio, elected, and co-opted members of the Parochial Church Council. Trustees are elected annually at the Annual Parish Meeting (Wardens) and the Annual Parochial Church Meeting (PCC Members).

PCC members who have served during the period covered by this report are:

Ex Officio

Incumbent (Chair) Anika Gardiner *from September 2024*

Licensed Lay Minister Lynn Anne Comer

Wardens Colette Anne Longbottom
David Titterington-Cook

*Deanery Synod
Representatives* Sally Christine Maybridge
Christina Jane Pownall
Edwin Leonard Schofield

*Diocesan Synod
Representatives* George Clarke *from November 2024*
Liz Foster *from November 2024*
Naomi Ruth Clare Orrell *from June 2024*

Elected Members

Stephen Michael Adams
Alfreda Alderson
Mark Justin Comer
Elizabeth Anne Davies

Rebecca Amy Dunn
Jennifer Gwynne
Naomi Ruth Clare Orrell
David James Pownall
Elizabeth Marjorie Sharp
Gillian Mary Tyler
Elizabeth Ann Village

to June 2024

Co-opted Members

Deacon

Margaret Elizabeth Carrington

OTHER CHARITY OFFICERS (NON-TRUSTEES)

GOVERNING DOCUMENT

The charity's principal governing document is the Parochial Church Council Powers Measure (1956) as amended *and* Church Representation Rules that came into force on 02 January 1956 and were revised in 2020.

CHARITABLE OBJECTIVES

The charity's stated objective is promoting in the Ecclesiastical Parish the whole mission of the Church.

BANKERS

The charity's funds are invested in four banks and investment groups as follows.

The Cooperative Bank	Flagstone Investment Management	CCLA Investment Management
PO Box 250	1 st Floor, Clareville House	Senator House
Delf House	26-27 Oxendon Street	85 Queen Victoria Street
Skelmersdale	London	London
WN8 6WT	SW1Y 4EL	EC4V 4ET

Methodist Chapel Aid
1 Telford Terrace
Albermarle Road
York
YO24 1DQ

INTRODUCTION

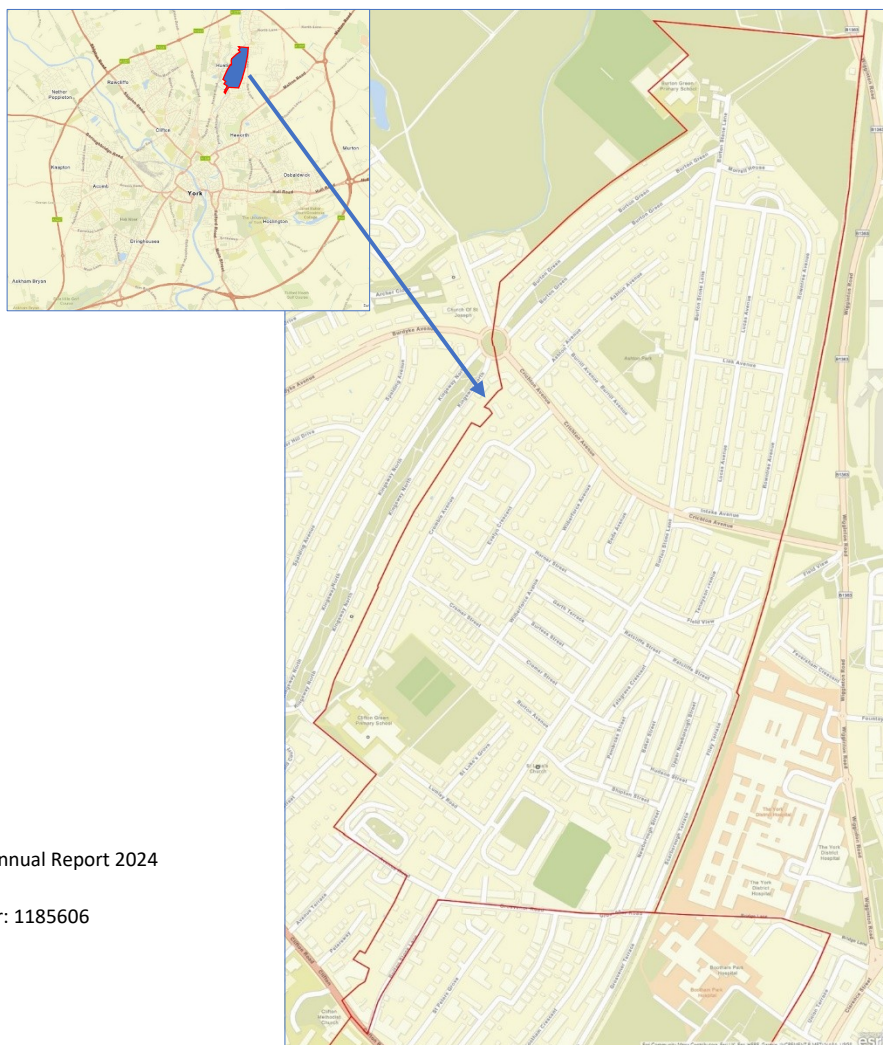
The Parochial Church Council presents their report and accounts for the year ended 31st December 2024. The financial statements comply with the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) (effective 1 January 2019).

The report covers the year 2024 between 01 January 2024 and 31 December 2024. However, the election of the PCC, who are the charity's trustees, took place at the church's Annual Parish and Annual Parochial Church Meetings (APCM) on 21st April 2024. The church's financial year covers the calendar year of 2024 as required for all Anglican churches in the Diocese of York. The accounts for 2024 are the latest full set of accounts for the period of this Trustees Report.

St Luke's continued to demonstrate that it is indeed a praying, caring, sharing church willing to live out its vision in the community it serves.

STRUCTURE, GOVERNANCE, AND MANAGEMENT

St Luke's is an Ecclesiastical Parish Church in the Church of England, part of the Diocese of York. It is situated about a mile north of York Minster, standing on the corner of Burton Stone Lane and Shipton Street. The Parish extends eastwards from A19 Clifton with Burton Stone Lane as its spine. It is bounded by the York-to-Scarborough railway line to the east, and Kingsway North and Burton Green to the west and north.



THE PAROCHIAL CHURCH COUNCIL (THE TRUSTEES)

The Parochial Church Council (PCC) is a body corporate under the *Parochial Church Councils (Powers) Measure 1956* and the *Church Representation Rules* (revised in 2020). It is a charity registered with the Charities Commission (Registration Number 1185606).

Inter alia, the PCC is responsible for making decisions on all matters of general concern and importance to the Parish, including deciding how the funds of the PCC are to be spent.

The method of appointment and election of PCC members, including *ex officio* members, is set out in the *Church Representation Rules*. The membership of the PCC at St. Luke's is set out above on pages 4 and 5.

Elections for Churchwardens, PCC Members, and Deanery Synod Representatives takes place annually. In 2023, these elections took place on 21st April 2024.

Elected members of the PCC serve a one- or three-year term and may stand for re-election at the end of their term. Deanery Synod representatives are elected for the duration of the Synod's triennium. Approximately one third of the elected membership of the PCC becomes vacant every year. Any person on the Electoral Roll of the Parish for more than six months preceding an election may stand to be a member of the PCC.

The PCC held four full meetings during the year, one of which was a full day PCC meeting in July. There were four additional short meetings and two online meetings via email.

St Luke's Safeguarding policies were reviewed and agreed by the PCC in January 2024.

Given the wide responsibility of the mission and ministry, and to encourage the growth of the church, several groups exist from time to time to be responsible for a particular aspect of Parish life. The buildings project group continued in 2024 to look at specific plans for church hall buildings. All groups report to the PCC.

RISK MANAGEMENT

The PCC is resolved to take appropriate steps to manage and mitigate risk through robust governance. These steps include regular monitoring of risk and identifying means to mitigate risks. This includes data protection compliance, financial monitoring including a reserves policy, safeguarding policies, and health and safety policy and risk assessments. Appropriate financial systems and procedures have been established to manage and identify financial risks. Budgetary and accounting risks are minimised by continual scrutiny of the accounts by the PCC at its regular meetings, and financial summaries are routinely circulated to the PCC between meetings.

PUBLIC BENEFIT

The Trustees confirm that they have complied with the duty of Section 4 of the Charities Act 2006 to have due regard to the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives, and in planning activities and setting policies and priorities for the year ahead.

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).

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 charity's 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.

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 1993 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 PCC

Gillian Tyler, PCC Secretary

St Luke's PCC works together, in promoting the Ecclesiastical Parish, and the whole mission of the Church of England – pastoral, evangelistic, social, and ecumenical. In addition to its stated charitable objective of promoting the Ecclesiastical Parish, the PCC has resolved that

- **We believe in one God: Father, Son, and Holy Spirit;**
- **We are a Christian family of people who worship and serve God; and,**
- **We are a praying community, committed to caring for one another and those in our community, and sharing God's love with everyone.**

The Rev Anika Gardiner was collated and inducted as vicar of St Luke's on 2 September 2024, ending a vacancy which had lasted over 3½ years. During the vacancy, the activities, mission and objectives continued to be supported by the PCC with the Churchwardens taking responsibility, supported by retired clergy from the Diocese. The vicar now continues to work with the PCC and ministry teams to uphold and evolve the activities, mission and objectives of the Trust.

The PCC is also specifically responsible for maintaining St Luke's Church Hall in Shipton Street, York, which is located adjacent to the church building.

WORSHIP AND PRAYER

The PCC is committed to enabling as many people as possible to become part of the worshipping community of the church, as well as working to care for the residents of the whole Ecclesiastical Parish. The PCC maintains an overview of the governance of the parish, as well as its worship and missional activities, and appoints individuals and creates groups to help facilitate its mission.

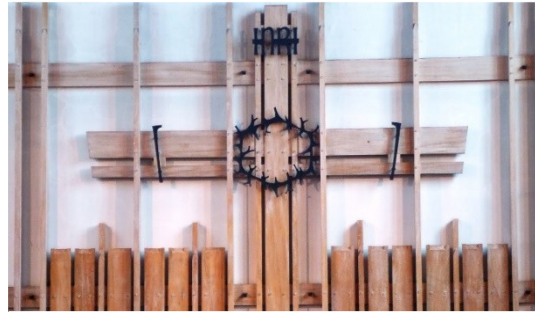
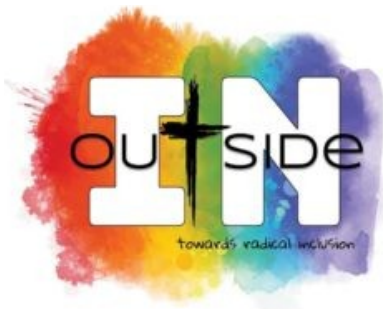
Services

St Luke's holds regular services of divine worship and occasional offices. These are offered during the week and throughout the year, which the community finds socially beneficial and spiritually uplifting. As an inclusive church, the PCC ensures that all services are provided in meaningful ways; the sacraments are rooted in Scripture that declares all God's children are loved. Together, the church community explores what this means for St Luke's and the wider Church.

The church's worship includes:

- **Sunday services**, in accordance with the Canons of the Church of England, with additional time for reflection during the service and a time for refreshments and socialisation afterwards;
- **4everyone**, a monthly short, fun service for families with young children.
- **outsideIN**, a monthly Eucharist or service of prayer held on the first Saturday of every month, serving people who identify as LGBTQ+, their friends, and all who are committed to inclusion.

Both ordained and lay members of the congregation also provide spiritual direction, prayer, study groups, and other forms of worship on regular occasions.



Occasional Offices

In addition to regular and routine services, St Luke's enables the Parish and others to celebrate and give thanks to God at the milestones of a person's journey through life. This is conducted through baptism, in which we give thanks to God for the gift of a new child and commit them to the church community; the public declarations of love and the exchanging of the vows of marriage; and enabling at funerals the expression of families' grief in the loss of their loved ones, and the sure hope of the resurrection of the dead and the commendation of the dead into the hands of God.

During 2024 there were 7 funeral services and 3 baptisms.



MISSION AND EVANGELISM

St Luke's is committed to the mission of the Church of England as expressed in the Five Marks of Mission:

- **Tell** – to proclaim the Good News of the Kingdom;
- **Teach** – to teach, baptise and nurture new believers;
- **Tend** – to respond to human need by loving service;
- **Transform** – to transform unjust structures of society, to challenge violence of every kind, and pursue peace and reconciliation; and,
- **Treasure** – to strive to safeguard the integrity of creation and sustain and renew the life of the earth.

St Luke's main aim in mission and evangelism is to enable everyone to live out their faith as part of our worshipping community through worship and prayer, the provision of pastoral care, outreach work, and promoting inclusion, affirmation and celebration..

Children and Youth Work

St. Luke's children's groups include Explorers, for children aged 3 to 11, which meets regularly on a Friday evening from 5 to 6pm with about 10-15 children attending each week. Pathfinders, for children aged 10 to 18, meets once every half term for an activity followed by supper and a time of worship.

On a Sunday morning, during the 10am communion service, children go into the children's chapel during the sermon and intercessions for their own teaching and activities. There were special family services on a morning throughout the year including Mothering Sunday, Easter, Harvest and the Crib service which the children helped at in various ways.

St. Luke's activity week continued in 2024 when we ran 'Shiver me Timbers' for four mornings in August. The theme this year was pirates. Around 40 children joined us for three hours of fun each morning including listening to Bible stories, doing craft activities, playing games and singing.

St Luke's Toddler group runs every Monday morning.

Green and Environmental Work

In keeping with the Church of England's commitment to treasure and safeguard God's creation, the PCC operates and participates in green and environmental initiatives to sustain and renew the life of the earth.

Changes to our collective lifestyles and habits play an important role in helping the health of our planet. Members of the PCC have committed to using the online Lifestyle Audit tool made by Creation Care to assess what improvements we can make as households towards greener and more sustainable lifestyles. Creation Care is specially designed for churches, so allows households to register linked to their church. There are 14 households registered under St Luke's, York. Creation Care links to Eco-Church using the same categories to help us consider our lifestyle impacts: Worship and Prayer; Home; Garden; Travel; Food; Possessions; Community and Global Engagement.

The church Green Group encourages people in the church and beyond to take part in various eco-friendly activities such as litter-picking, butterfly counts, maintaining the church grounds, and tree planting. We also use our parish magazines to spread information and offer advice and tips on healthy living.

We continue to build links with other eco churches in York and keep in touch with York Environment Forum. We have met with St Clement's Church to help them establish their Eco-church journey and also with Clifton Parish Church. They plan to hold Green Forum meetings for interested churches to exchange ideas and encourage one another.

Communications

Communicating St Luke's faith, worship, aims, and activities is a year-round activity, and the church is grateful to those who keep it going. Individuals work hard to produce posters, flyers, leaflets, and more – as well as compiling, designing, arranging, printing, and distributing our widely-admired Grapevine magazine and monthly Grapevine Lite. In addition they maintain the website and St. Luke's Facebook page and the St. Luke's Facebook Community Group as well as having an email distribution list (following GDPR) to communicate with members of the congregation.

Community Engagement

Community outreach at St Luke's has been predominately around Luke's Larder. From Feb 2024 to Feb 2025, we have served 3,224 customers and the number of people for whom food was collected came to 7,275, a 19% increase on the previous year. Our average weekly number of customers has risen from last year from just over 50 to just over 60 and

this can rise to over 70 depending on school holidays, inclement weather and changes to the number of refugees who

have overall constituted 25% of our customer base in the last year. Our customers are a mixture of working families, households where there is disability, grandparents feeding grandchildren more than twice a week, lone householders, pensioners, young people who have emerged from the care system into independent living, ex-service personnel, refugees, and others whose income means they struggle to make ends meet. Up to 25% of those fed are under the age of 16 and since September we have seen an increase in refugees accessing the Larder. The Larder meets more than the need for food and with the connections we have been able to form in the Parish and wider Ward enables us to facilitate a variety of the needs in our community.

We are incredibly grateful for the support from our local councillors and for the Ward Funding towards paying our annual Fareshare subscription. In addition to the food, we collect from Tesco, Sainsburys, Aldi, Farmfoods and KFC the Fareshare deliveries provide fresh, chilled, and frozen food for us to distribute. We are also very thankful to those who donate each month to the Larder via church funds and via the crate at the back of church to support us.

The Area Co-ordinator Anna Harrison is a great help and vital part of our ability to communicate with other social providers and a conduit of assistance towards our customers wider needs. We are thankful to our friends at Clifton Methodist for their ongoing weekly support.

'Joyful Connections' café meets regularly every Friday morning providing a warm space and friendship for the people who attend and Tuesday Club runs every Tuesday afternoon with a chance for a game of bingo and tea and chat.

The church trusts and prays that it will continue to be able to meet the needs of the community. That would be greatly enhanced by being able to complete phase 2 of our Community Hub project, which involves redeveloping our ageing church hall. Following discussions in August 2024 with Viv Cooling the new Diocesan Funding and Community Engagement Advisor, the PCC decided to aim to raise enough money to complete the project in one go.

Spiritual Enrichment and Nurture

St Luke's recognises it is the responsibility of everyone to recognise and encourage all that God is about amongst us. Time should be set aside to pray regularly.

Prayer support by the prayer team continues, with individual requests coordinated and shared in confidence with the team. Other activities this year include prayer walks around the parish, joining other churches to pray for all churches, schools and community projects.

St Luke's commitment to spiritual nurture and enrichment extends to all church groups, activities, events, and conversations.

Welcome and Inclusion

The aim of the Welcome and Inclusion Team is to support St Luke's on our journey towards becoming a radically inclusive and welcoming community. Over the past year we have continued to work on our priorities in line with the St Luke's Plan4Growth developed in 2018. The Welcome Team have continued to be a key part of the warm and inclusive welcome that people receive at St Luke's. They welcome people when they first come into the building, and follow this up by offering to accompany them to the hall after the service.

Making the church buildings, services and our life together accessible to all, remains a high priority. In 2024 it was decided to run an accessibility audit early in 2025, which was duly completed.

OutsideIN – is a worshipping community at St Luke's for LGBT+ people, their families and friends and anyone who wants to belong to an inclusive and loving community. Some 20-25 people attend a service each month. Christians at Pride in York (CaPiY) continues to flourish and grow. Having started as just St Luke's in 2018, we grew to five churches in 2023 and will be 11 in 2025.

PASTORAL CARE

St Luke's provides pastoral care across the Ecclesiastical Parish in various ways. Everyone who regularly worships at St Luke's is well known to the PCC and Churchwardens, and their pastoral needs can be identified, and support offered.

We have a Deacon and Authorised Lay Minister with specific responsibility for pastoral care and worship, and they provide a listening ear and outreach to the community, as well as the provision of prayer and the sacraments.

WORK WITHIN THE CHURCH OF ENGLAND

The three Deanery Synod Representative members of the PCC sit on the Deanery Synod for York Deanery. The Deanery Synod considers growth, mission, evangelism, and other matters which concern churches in the city centre and local area. This provides the PCC with an important link between St Luke's and the wider work of local churches.

The Deanery Synod met three times during the year. The four goals of the deanery plan "Living Christ's Story" – becoming more Christlike, gaining younger and more diverse church members, reaching out to those who don't know Jesus, and transforming our structures and finances were the main focus for discussion. The Dioceses are also looking at environmental issues.

ECUMENICAL RELATIONS

St Luke's works with churches of other Christian denominations for certain projects throughout the year. Under the banner of Christians at Pride we join with other Church of England churches and York Central Methodists in support of York Pride. The PCC remains committed to working alongside other Christians, and other religious groups, to promote inclusion and affirmation.

VOLUNTEERS AND LAY WORKERS

The PCC is grateful that it has been supported by numerous volunteers over the year, who together make the church a praying, caring, and sharing presence in the Ecclesiastical Parish and beyond. The PCC recognises that without the work of the church's volunteers, it could not operate such a welcoming and inclusive church.

Authorised Lay Ministers

We have two Authorised Lay Ministers. These individuals are licensed and permitted to visit parishioners, administer the reserved sacrament to the sick and housebound, undertake hospital and bereavement visits, assist the celebrant at services in sheltered accommodation and care homes in the parish, administer the chalice at Holy Communion, and be part of the prayer and ministry team.

Sidespeople

Sidespeople are an office established under Canon E2 (Of sidesmen or assistants to the churchwardens), who are appointed by the parochial church council to "promote the cause of true religion in the Parish and to assist the churchwardens in the discharge of their duties in maintaining order and decency in the church and churchyard, especially during the time of divine service".

At St Luke's, specific duties include welcoming people when they come into church, and enabling services to take place in good order.

Other Volunteers

St Luke's does not employ any staff, and so all the church's activities are carried out on a voluntary basis. This includes children and youth workers, the PCC Secretary and Treasurer, a church hall secretary, pastoral support, prayer loop volunteers, eucharistic assistants, and all members of the groups mentioned in this report which contribute to and facilitate the life and work of the church.

BUILDINGS WORK

In Autumn of 2024 we completed the outstanding works to the church that were identified as needed in the last quinquennial report. These included repairs to high level windows, various masonry works, and the repair of gutters and downpipes. Temporary repairs to the church hall continue to be necessary in order to keep it safe and functioning as we await the hopeful renewal of the building as part of our Community Hub project.

FINANCIAL REPORT

INDEPENDENT EXAMINER'S REPORT

Report to the trustees/members of	THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF ST LUKE THE EVANGELIST YORK
On the accounts for the year ended	31 December 2024
Charity number	1185606
Set out on pages	20 – 28
Responsibilities and basis of report	I report my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2023.

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 I am qualified to undertake the examination by being a qualified member of The Chartered Institute of Management Accountants and The Association of International 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.

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Date:

25 April 2025



St Luke's, York – Tr

Charity Registration Number: 1185606

Name: Steve Logun

Relevant professional qualification(s) ACMA CGMA AAIA

Address: 17 Derek Vivian Close
Pocklington
East Riding of Yorkshire
YO42 2PL

OVERVIEW

In a year that has seen the arrival of many new faces in the congregation, including a new vicar), I am happy to report the church finances are also in a relatively healthy position.

INCOME

Planned Giving (via bank payments, envelopes and the Parish Giving Scheme) has seen a modest increase during 2024, of around 1.1%. This is a good thing although it is below inflation. This increase has come from a few new regular givers and a couple of givers increasing their donations, although we have lost one or two regular donors this year as well. Several of the new donations are coming through the Parish Giving Scheme. If you would like to start (or switch to) giving that way, please contact me and I will give you the details.

St Luke's Tide Gift Day in October 2024 was designated to the Community Hub fund and saw donations of £5,370.

We were awarded Ward Committee grants for Activity Week (£550), Grapevine (£2,400) and Joyful Connections (£400). We have also already received Ward Committee grants for Activity Week (£550) and Grapevine (£2,400) for 2025. We did not receive any legacies in 2024, although we did have a couple of funeral collections in aid of St Luke's.

Regular giving for Luke's Larder was £260 per month for most of 2024, the majority of which is eligible for Gift Aid. This is in addition to the £2,385 cash given in 2024 at the Wednesday sessions. The Gift Aid claim resulted in an extra £1,506.

The Gift Aid claim on 2024 donations (including the Parish Giving Scheme and the Gift Aid Small Donations Scheme) amounted to a payment from HMRC of £19,110. Gift Aid is a scheme by which charities can claim back the basic-rate tax that was paid on donations. It is now being claimed three times per year (in April, August & December). This improves cashflow and also makes the accounting simpler as the Gift Aid is claimed in the same accounting year as the donation was made.

This year saw a slight increase in hall lettings with takings of £3,695, which is an increase of £298 compared to 2023. Several special events over the year (including the Christmas Fayre, the Quiz Night, the Songbird concert and the Beloved Son performance) generated just under £2,000, which has been designated to the Community Hub fund.

EXPENDITURE

As always, the largest item of expenditure is the Freewill Offering which this year was £59,160, which was a 6.4% increase on the previous year. Following discussions in the PCC and with guidance from the Diocese, the offering for 2025 will be increased to £60,960. This increase is part of a longer-term intention, following the Diocesan appeal for each parish to work towards giving their Total Cost of Ministry by 2031. For St Luke's this would be around £80,000 per year. At the moment, we are covering our Direct Cost of Ministry (£52,670), which is the cost to run our parish including a full-time paid vicar, but not yet covering all of our proportion of the Shared Costs in the wider church (such as cost of training new priests).

St Luke's convention of giving 10% of our previous year's unrestricted income to charity was resumed in 2024. £9,180 was shared between six chosen charities - Water Aid, Christian Aid, RAY (Refugee Action York), St Nick's, CAP (Christians Against Poverty) and York Mind.

Other significant outlays were to repair the roof (£3,050) and installation of the handrails in the side chapels (£960).

Gas and electricity costs for the Church and Hall amounted to £8,076 for the year, which is a small reduction of £173 over the previous year's bills. Usage increased slightly but there was a reduction in the price of energy compared to last year.

Going forward, as we begin fundraising for the new Community Hub in earnest, we already have £369,660 in the bank, from the fundraising and donations that have already come in, as well as two legacies (John Brown & Marjorie Edgar).

RESERVES

The Diocesan benchmark for Reserves is four times the monthly unrestricted expenditure which would mean a current level of around £30,300. Reserves are made up of the money remaining at the end of the financial year, which is set aside so that if all our income dried up immediately, we could meet our financial obligations for four months – essentially a rainy-day fund. We currently have Reserves of £30,478, meaning we have met this standard for the first time in many years. It is the policy of the PCC to maintain this level of Reserves when possible.

STATEMENT OF GOING CONCERN

The accounts were prepared on a going concern basis. The Trustees have concluded that the charity is a going concern.

The church can meet its operating costs and holds a suitable amount in total reserves. Whilst its benchmark for reserves is against the general reserves, the legacy reserves can be utilised to meet operational needs.

The church intends to use the legacy reserve for building works on the church and church hall. The church had experienced a decline in giving during the coronavirus pandemic, and a loss of income from the church hall lettings. The church is promoting the use of electronic giving to supplement lost loose plate collection income and other donations. The church can apply to the Diocese of York for financial support if necessary.



Sally Maybridge, Treasurer

End of Year Financial Statements

Year ending 31st December 2024

RECEIPTS AND PAYMENTS ACCOUNT

	Unrestricted funds	Designated funds	Restricted funds	Endowment funds	Total funds	Prior year total funds
Receipts						
Voluntary Income						
Planned Giving	62,508	—	3,460	—	65,968	64,556
Collection at services	1,559	89	10	—	1,658	1,322
Donations	854	—	6,433	—	7,287	2,482
Gift Day	90	—	5,280	—	5,370	7,425
Grants	—	—	6,450	—	6,450	15,975
All other giving/voluntary income	1,067	—	—	—	1,067	1,215
Gift Aid recovered	15,636	27	3,395	—	19,059	14,074
Activities for Generating Funds	3,936	1,804	210	—	5,950	4,959
Investment income	3,246	14,952	2,556	—	20,755	3,855
Church Activities	1,175	—	503	—	1,678	1,895
Other incoming resources	—	—	—	—	—	—
Total receipts	90,073	16,874	28,299	—	135,247	117,762
Payments						
Church activities	—	—	5,473	—	5,473	4,238
Free Will Offering	59,160	—	—	—	59,160	55,560
Clergy and Staffing	1,216	—	—	—	1,216	975
Church running expenses	14,345	65	2,969	—	17,380	19,671
Hall running costs	3,548	—	—	—	3,548	3,885
Church Major Repairs	3,050	960	—	—	4,010	7,218
Hall Major Repairs	—	—	—	—	—	2,329
Mission giving & donations	9,180	—	—	—	9,180	4,660
Cost of generating funds	—	—	—	—	—	1
Costs of generating voluntary income	—	—	—	—	—	—
Fundraising Trading costs	81	—	—	—	81	285
Investment management costs	—	745	—	—	745	—
New Building Work	—	1,120	—	—	1,120	3,632
Total payments	90,581	2,891	8,443	—	101,917	102,458
Excess of receipts over payments before transfer	(507)	13,982	19,855	—	33,330	15,303
Transfers						
Gross transfers between funds - in	—	—	14	—	14	766
Gross transfers between funds - out	(14)	—	—	—	(14)	(766)
Excess of receipts over payments before other gains / losses	(521)	13,982	19,869	—	33,330	15,303
Net movement in funds	(521)	13,982	19,869	—	33,330	15,303
All assets at 01 January 2024	29,727	238,666	129,835	—	398,229	382,925
All assets at 31 December 2024	29,205	252,649	149,705	—	431,560	398,229
Represented by						
Unrestricted						
General fund	29,205	—	—	—	29,205	29,727
Designated						

Building Fund (Chairs)	—	—	—	—	—	—
Community Hub	—	1,893	—	—	1,893	—
Legacy Fund	—	250,526	—	—	250,526	238,399
Mission	—	101	—	—	101	166
Youth Fund	—	127	—	—	127	100
Restricted						
Building Fund (Chairs)	—	—	5,966	—	5,966	5,966
CAC Travel	—	—	—	—	—	—
Collation	—	—	118	—	118	—
Community Fund (Joyful Connections)	—	—	965	—	965	680
Community Hub	—	—	131,447	—	131,447	120,119
Flower Fund	—	—	—	—	—	(14)
Green Group Fund	—	—	88	—	88	188
Luke's Larder	—	—	4,207	—	4,207	2,074
Magazine Fund	—	—	3,350	—	3,350	—
Mission	—	—	—	—	—	—
Mums & Toddlers	—	—	—	—	—	—
Music Fund	—	—	352	—	352	436
Pride & Inclusive Church	—	—	2,000	—	2,000	—
Sunnydene	—	—	—	—	—	—
Youth Fund	—	—	1,209	—	1,209	383

FUND MOVEMENT BY TYPE

	Opening	Incoming	Outgoing	Transfers	Gains/losses	Journals	Closing
Collation - Collation							
Restricted	—	355	237	—	—	—	118
Sub-total for Collation	—	355	237	—	—	—	118
General - General fund							
Unrestricted	29,727	90,073	90,581	(14)	—	—	29,205
Sub-total for General	29,727	90,073	90,581	(14)	—	—	29,205
COMMHUB - Community Hub							
Designated	—	1,893	—	—	—	—	1,893
Restricted	120,119	11,328	—	—	—	—	131,447
Sub-total for COMMHUB	120,119	13,222	—	—	—	—	133,341
Legacy - Legacy Fund							
Designated	238,399	14,952	2,825	—	—	—	250,526
Sub-total for Legacy	238,399	14,952	2,825	—	—	—	250,526
BUILDING - Building Fund (Chair							
Restricted	5,966	—	—	—	—	—	5,966
Sub-total for BUILDING	5,966	—	—	—	—	—	5,966
JoyfulConn - Community Fund (Joyf							
Restricted	680	400	115	—	—	—	965
Sub-total for JoyfulConn	680	400	115	—	—	—	965
Mission - Mission							
Designated	166	—	65	—	—	—	101
Restricted	—	—	—	—	—	—	—
Sub-total for Mission	166	—	65	—	—	—	101
Lukeslard - Luke's Larder							
Restricted	2,074	7,606	5,473	—	—	—	4,207
Sub-total for Lukeslard	2,074	7,606	5,473	—	—	—	4,207
PRIDE - Pride & Inclusive Ch							
Restricted	—	2,000	—	—	—	—	2,000
Sub-total for PRIDE	—	2,000	—	—	—	—	2,000
FLOWER - Flower Fund							
Restricted	(14)	—	—	14	—	—	—

Sub-total for FLOWER	(14)	—	—	14	—	—	—
Green - Green Group Fund							
Restricted	188	—	100	—	—	—	88
Sub-total for Green	188	—	100	—	—	—	88
MAGS - Magazine Fund							
Restricted	—	4,950	1,600	—	—	—	3,350
Sub-total for MAGS	—	4,950	1,600	—	—	—	3,350
MUSIC - Music Fund							
Restricted	436	9	93	—	—	—	352
Sub-total for MUSIC	436	9	93	—	—	—	352
YOUTH - Youth Fund							
Designated	100	27	—	—	—	—	127
Restricted	383	1,651	824	—	—	—	1,209
Sub-total for YOUTH	483	1,679	824	—	—	—	1,337
Grand total	398,229	135,247	101,917	—	—	—	431,560

STATEMENT OF ASSETS AND LIABILITIES

	General	Designated	Restricted	Endowment	This year	Last year
Current assets - Cash at bank and in hand						
Bank current account -	14,195	(295)	55,819	—	69,719	58,287
Totals	14,195	(295)	55,819	—	69,719	58,287
Current assets - Debtors						
Accounts Receivable -	3,177	—	2,423	—	5,600	166
Totals	3,177	—	2,423	—	5,600	166
Current assets - Investments						
CCLA (CBF) deposit account -	16,817	66,673	7,091	—	90,582	86,017
Flagstone Investment Management -	(1,610)	186,271	—	—	184,660	171,726
Methodist Chapel Aid Ltd -	—	—	85,000	—	85,000	85,000
Totals	15,206	252,944	92,091	—	360,243	342,743
Liabilities - Agency accounts						
Agency collections -	—	—	629	—	629	(115)
Totals	—	—	629	—	629	(115)
Liabilities - Creditors: Amounts falling due in one year						
Accounts Payable -	3,374	—	—	—	3,374	3,083
Totals	3,374	—	—	—	3,374	3,083
Grand total	29,205	252,649	149,705	—	431,560	398,229

ANALYSIS OF RECEIPTS AND PAYMENTS

INCOME AND ENDOWMENTS

	<u>Unrestricted</u>	<u>Designated</u>	<u>Restricted</u>	<u>Endowment</u>	<u>Total</u> <u>This year</u>	<u>Last year</u>
Voluntary Income - Planned Giving						
Regular Giving - Bank (Gift Aid)	46,315	—	—	—	46,315	47,391
Regular Giving - PGS (Gift Aid)	11,433	—	—	—	11,433	9,395
Regular Giving - Envelopes (Gift Aid)	780	—	—	—	780	865

Regular Giving - Bank (Non-GA)	3,980	—	—	—	3,980	4,150
Luke's Larder - Bank Transfer	—	—	3,460	—	3,460	2,755
Total	62,508	—	3,460	—	65,968	64,556

Voluntary Income - Collection at services

Loose plate collections	1,559	89	10	—	1,658	1,322
Total	1,559	89	10	—	1,658	1,322

Voluntary Income - Donations

One-off Donations/Appeals - Gift Aid	140	—	3,021	—	3,161	1,033
One-Off Donations/Appeals - Not GA	693	—	289	—	982	373
One-off Donations/Appeals - PGS	20	—	750	—	770	—
One-off Donations/Appeals - SumUp	1	—	—	—	1	—
Transaction Fee (SumUp / PGS)	0	—	(11)	—	(11)	—
Luke's Larder - Loose Plate	—	—	2,385	—	2,385	1,075
Total	854	—	6,433	—	7,287	2,482

Voluntary Income - Gift Day

Regular Gift Days - Gift Aid	—	—	5,225	—	5,225	6,425
Regular Gift Days - Other	90	—	55	—	145	1,000
Total	90	—	5,280	—	5,370	7,425

Voluntary Income - Grants

Recurring grants	—	—	—	—	—	—
Non-recurring one-off grants	—	—	6,450	—	6,450	15,975
Total	—	—	6,450	—	6,450	15,975

Voluntary Income - All other giving/voluntary income

Giving through church boxes	141	—	—	—	141	135
Refreshments	926	—	—	—	926	1,080
Legacies	—	—	—	—	—	—
Total	1,067	—	—	—	1,067	1,215

Voluntary Income - Gift Aid recovered

Tax Recovered - Gift Aid (HRMC)	12,773	27	3,207	—	16,008	11,725
Tax Recovered - Parish Giving Scheme	2,863	—	187	—	3,050	2,348
Total	15,636	27	3,395	—	19,059	14,074

Activities for Generating Funds

Other funds generated	—	—	—	—	—	12
Coffee Mornings, Concerts & other events	—	1,804	210	—	2,014	1,480
Bookstall sales - fund raising	—	—	—	—	—	—
Church hall lettings - fund raising	3,695	—	—	—	3,695	3,397
Magazine income - advertising	—	—	—	—	—	—
Photocopy sales	241	—	—	—	241	70
Total	3,936	1,804	210	—	5,950	4,959

Investment income

Bank and building society interest	3,246	14,952	2,556	—	20,755	3,855
Total	3,246	14,952	2,556	—	20,755	3,855

Church Activities

Fees for weddings and funerals	1,175	—	—	—	1,175	434
Bookstall sales to promote objectives	—	—	—	—	—	—
Church hall lettings - objectives	—	—	—	—	—	—
Parish magazine sales	—	—	—	—	—	—
Children's Work	—	—	392	—	392	125
Pathfinder Weekend	—	—	—	—	—	1,150
Activity Week	—	—	111	—	111	186
Total	1,175	—	503	—	1,678	1,895

Other incoming resources

Insurance claims	—	—	—	—	—	—
Total	—	—	—	—	—	—
INCOME TOTAL	90,073	16,874	28,299	—	135,247	117,762

EXPENDITURE

	Unrestricted	Designated	Restricted	Endowment	Total This year	Last year
--	--------------	------------	------------	-----------	--------------------	-----------

Church activities

Luke's Larder	—	—	5,473	—	5,473	4,238
Total	—	—	5,473	—	5,473	4,238

Church activities - Free Will Offering

Free Will Offering	59,160	—	—	—	59,160	55,560
Total	59,160	—	—	—	59,160	55,560

Church activities - Clergy and Staffing

Assistant staff costs	—	—	—	—	—	—
Salary of Organist	1,100	—	—	—	1,100	975
Working expenses of incumbent	—	—	—	—	—	—
Council tax	—	—	—	—	—	—
Vicarage Costs	—	—	—	—	—	—
Vicarage Water	—	—	—	—	—	—
Vicar's telephone	116	—	—	—	116	—
Visiting speakers	—	—	—	—	—	—
Total	1,216	—	—	—	1,216	975

Church activities - Church running expenses

Training	—	—	—	—	—	—
Parish training and mission	—	65	215	—	280	108
Children's Work	—	—	154	—	154	382
Activity Week	—	—	670	—	670	606
Pathfinder Weekend	—	—	—	—	—	898

Church running - insurance	2,453	—	—	—	2,453	2,391
Church office - telephone/broadband	59	—	—	—	59	100
Photocopier Service (Usage)	930	—	—	—	930	509
Photocopier Lease	1,060	—	—	—	1,060	1,060
Organ / piano tuning	334	—	—	—	334	265
Church running - maintenance	1,981	—	—	—	1,981	1,964
Cleaning	132	—	—	—	132	34
Upkeep of services	1,558	—	93	—	1,651	1,082
Upkeep of churchyard	—	—	—	—	—	—
Administration	364	—	—	—	364	244
Refreshments	495	—	237	—	732	423
Church running - electric	1,647	—	—	—	1,647	1,819
Church running - gas	3,325	—	—	—	3,325	5,300
Church running - water	—	—	—	—	—	—
Church running - heating and lighting	—	—	—	—	—	—
Magazine expenses	—	—	1,600	—	1,600	2,460
Governance costs examination/audit fee	—	—	—	—	—	17
PCC Meeting Costs	—	—	—	—	—	—
Total	14,345	65	2,969	—	17,380	19,671

Church activities - Hall running costs

Hall running - electricity	—	—	—	—	—	—
Hall running - gas	1,658	—	—	—	1,658	2,281
Hall running - insurance	1,269	—	—	—	1,269	1,248
Hall running - maintenance	288	—	—	—	288	66
Hall running - water	262	—	—	—	262	290
Hall running - heating and lighting	70	—	—	—	70	—
Total	3,548	—	—	—	3,548	3,885

Church activities - Church Major Repairs

Church major repairs - structure	3,050	—	—	—	3,050	4,162
Church major repairs - installation	—	960	—	—	960	3,055
Church interior and exterior decorating	—	—	—	—	—	—
Total	3,050	960	—	—	4,010	7,218

Church activities - Hall Major Repairs

Hall + major repairs - structure	—	—	—	—	—	2,329
Hall + major repairs - installation	—	—	—	—	—	—
Hall + interior and exterior decorating	—	—	—	—	—	—
Total	—	—	—	—	—	2,329

Church activities - Mission giving & donations

Giving to Missionary Societies	—	—	—	—	—	930
Giving - Relief and Development Agencies	3,580	—	—	—	3,580	930
Home Mission	1,550	—	—	—	1,550	2,100
Secular Charities	4,050	—	—	—	4,050	700
Total	9,180	—	—	—	9,180	4,660

Cost of generating funds

Bank Charges and Fees	—	—	—	—	—	1
Total	—	—	—	—	—	1

Cost of generating funds - Costs of generating voluntary income

Fees paid to fund raisers	—	—	—	—	—	—
Costs of applying for grants	—	—	—	—	—	—
Costs of stewardship campaign	—	—	—	—	—	—
Total	—	—	—	—	—	—

Cost of generating funds - Fundraising Trading costs

Costs of Coffee Mornings & other events	81	—	—	—	81	285
Bookstall costs	—	—	—	—	—	—
Total	81	—	—	—	81	285

Cost of generating funds - Investment management costs

Investment management costs	—	745	—	—	745	—
Total	—	745	—	—	745	—

New Building Work

New building Church	—	—	—	—	—	—
New building Hall	—	1,120	—	—	1,120	3,632
Total	—	1,120	—	—	1,120	3,632
EXPENDITURE TOTAL	90,581	2,891	8,443	—	101,917	102,458
GRAND TOTAL	(507)	13,982	19,855	—	33,330	15,303

Financial Report approved by the Trustees on 12 April 2025

Signature:

A. Gardiner

Full Name: Anika Gardiner

Position: PCC Chair

Date: 13/10/2025

The Trustees declare that they have approved the Trustees' Report above.

Signature:

A. Gardiner

Full Name: Anika Gardiner

Position: PCC Chair

Date: 13/10/2025

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES



Trustees' Annual Report

for the period

1st January 2023 to 31st December 2023

Charity

**THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF
ST LUKE THE EVANGELIST YORK**

Charity Registration Number

1185606



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ADMINISTRATIVE INFORMATION

CONTACT INFORMATION

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Burton Stone Lane
YORK YO30 6DG

Phone No. 07584 551915

Email treasurer@stlukesyork.org

Website <https://www.stlukesyork.org>

CHARITY TRUSTEES

The charity's Trustees are the ex officio, elected, and co-opted members of the Parochial Church Council. Trustees are elected annually at the Annual Parish Meeting (Wardens) and the Annual Parochial Church Meeting (PCC Members).

PCC members who have served from 1st January 2023 until the date this report was approved were:

Ex Officio

Incumbent (Chair)

Licensed Lay Minister Lynn Anne Comer

Wardens

Colette Anne Longbottom
David Titterington-Cook

Acting Chair from February 2021

Deanery Synod Representatives

Sally Christine Maybridge
Christina Jane Pownall
Edwin Leonard Schofield

Elected Members

Stephen Michael Adams
Alfreda Alderson
Mark Justin Comer
Elizabeth Anne Davies
Stewart Andrew Graham
Rebecca Amy Dunn
Jennifer Gwynne
Harriet Rachel Leigh

*to June 2023
from October 2023*

to April 2023

Anne Kathryn Lockitt
Naomi Ruth Clare Orrell
Phoebe Power
David James Pownall
Elizabeth Marjorie Sharp
Gillian Mary Tyler
Elizabeth Anne Village

to April 2023
from April 2023
to September 2023
from April 2023

Co-opted Members

Deacon

Margaret Elizabeth Carrington

OTHER CHARITY OFFICERS (NON-TRUSTEES)

GOVERNING DOCUMENT

The charity's principal governing document is the Parochial Church Council Powers Measure (1956) as amended *and* Church Representation Rules that came into force on 02 January 1956 and were revised in 2020.

CHARITABLE OBJECTIVES

The charity's stated objective is promoting in the Ecclesiastical Parish the whole mission of the Church.

BANKERS

The charity's funds are invested in four banks and investment groups as follows.

The Cooperative Bank	Flagstone Investment Management	CCLA Investment Management
PO Box 250	1 st Floor, Clareville House	Senator House
Delf House	26-27 Oxendon Street	85 Queen Victoria Street
Skelmersdale	London	London
WN8 6WT	SW1Y 4EL	EC4V 4ET

Methodist Chapel Aid
1 Telford Terrace
Albermarle Road
York
YO24 1DQ

INTRODUCTION

The Parochial Church Council presents their report and accounts for the year ended 31st December 2023. The financial statements comply with the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) (effective 1 January 2019).

The report covers the year 2023 between 01 January 2023 and 31 December 2023. However, the election of the PCC, who are the charity's trustees, took place at the church's Annual Parish and Annual Parochial Church Meetings (APCM) on 30th April 2023. The church's financial year covers the calendar year of 2023 as required for all Anglican churches in the Diocese of York. The accounts for 2023 are the latest full set of accounts for the period of this Trustees Report.

St Luke's continued to demonstrate that it is indeed a praying, caring, sharing church willing to live out its vision in the community it serves.

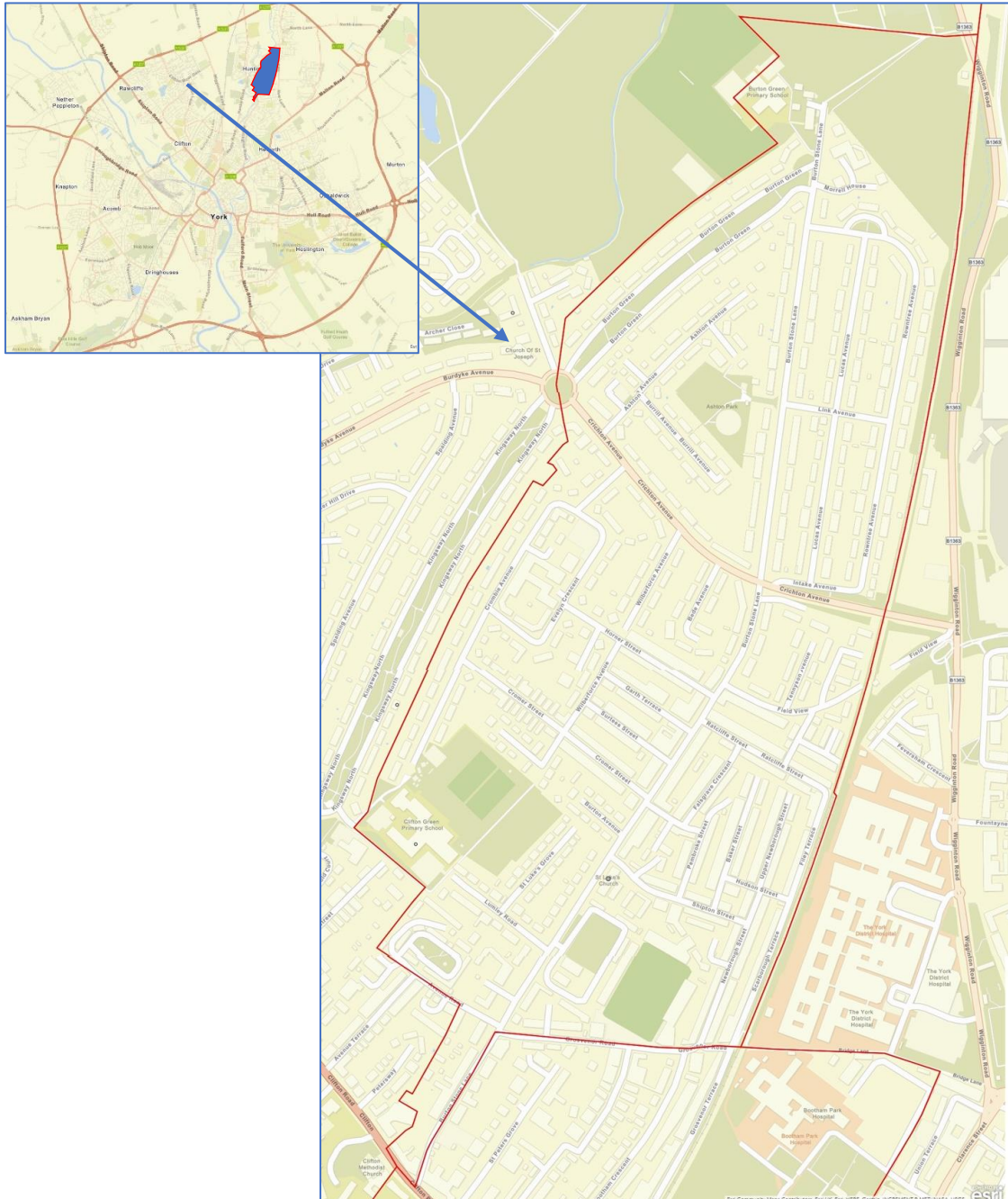
Work on the Community Hub project continued, although at a slower pace due to the financial restraints.

Luke's Larder continued to grow and is a much-needed service in the community

The PCC is committed to exploring new ways to serve the church's parish and congregation.

STRUCTURE, GOVERNANCE, AND MANAGEMENT

St Luke's is an Ecclesiastical Parish Church in the Church of England, part of the Diocese of York. It is situated about a mile north of York Minster, standing on the corner of Burton Stone Lane and Shipton Street. The Parish extends eastwards from A19 Clifton with Burton Stone Lane as its spine. It is bounded by the York-to-Scarborough railway line to the east, and Kingsway North and Burton Green to the west and north.



THE PAROCHIAL CHURCH COUNCIL (THE TRUSTEES)

The Parochial Church Council (PCC) is a body corporate under the *Parochial Church Councils (Powers) Measure 1956* and the *Church Representation Rules* (revised in 2020). It is a charity registered with the Charities Commission (Registration Number 1185606).

Inter alia, the PCC is responsible for making decisions on all matters of general concern and importance to the Parish, including deciding how the funds of the PCC are to be spent.

The method of appointment and election of PCC members, including *ex officio* members, is set out in the *Church Representation Rules*. The membership of the PCC at St. Luke's is set out above on pages 4 and 5.

Elections for Churchwardens, PCC Members, and Deanery Synod Representatives takes place annually. In 2023, these elections took place on 30th April 2023.

Elected members of the PCC serve a one- or three-year term and may stand for re-election at the end of their term. Deanery Synod representatives are elected for the duration of the Synod's triennium. Approximately one third of the elected membership of the PCC becomes vacant every year. Any person on the Electoral Roll of the Parish for more than six months preceding an election may stand to be a member of the PCC.

The PCC met four times during the year, with extra business conducted at six additional short meetings and four online meetings via email.

Given the wide responsibility of the mission and ministry, and to encourage the growth of the church, several groups exist from time to time to be responsible for a particular aspect of Parish life. The buildings project group continued in 2023 to look at specific plans for the church and church hall buildings. All groups report to the PCC.

RISK MANAGEMENT

The PCC is resolved to take appropriate steps to manage and mitigate risk through robust governance. These steps include regular monitoring of risk and identifying means to mitigate risks. This includes data protection compliance, financial monitoring including a reserves policy, safeguarding policies, and health and safety policy and risk assessments. Appropriate financial systems and procedures have been established to manage and identify financial risks. Budgetary and accounting risks are minimised by continual scrutiny of the accounts by the PCC at its regular meetings, and financial summaries are routinely circulated to the PCC between meetings.

PUBLIC BENEFIT

The Trustees confirm that they have complied with the duty of Section 4 of the Charities Act 2006 to have due regard to the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives, and in planning activities and setting policies and priorities for the year ahead.

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).

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 charity's 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.

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 1993 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 PCC

Gillian Tyler, PCC Secretary

ACTIVITIES, MISSION, AND OBJECTIVES

St Luke's PCC works together, in promoting the Ecclesiastical Parish, and the whole mission of the Church of England – pastoral, evangelistic, social, and ecumenical. In addition to its stated charitable objective of promoting the Ecclesiastical Parish, the PCC has resolved that

- **We believe in one God: Father, Son, and Holy Spirit;**
- **We are a Christian family of people who worship and serve God; and,**
- **We are a praying community, committed to caring for one another and those in our community, and sharing God's love with everyone.**

The Rev Jackie Doyle-Brett resigned her role and left on 7th February 2021, leaving a vacancy which remains unfilled. The activities, mission and objectives are continued by the PCC with the Churchwardens taking responsibility, supported by retired clergy from the Diocese.

The PCC is also specifically responsible for maintaining St Luke's Church Hall in Shipton Street, York, which is located adjacent to the church building.

WORSHIP AND PRAYER

The PCC is committed to enabling as many people as possible to become part of the worshipping community of the church, as well as working to care for the residents of the whole Ecclesiastical Parish. The PCC maintains an overview of the governance of the parish, as well as its worship and missional activities, and appoints individuals and creates groups to help facilitate its mission.

Services

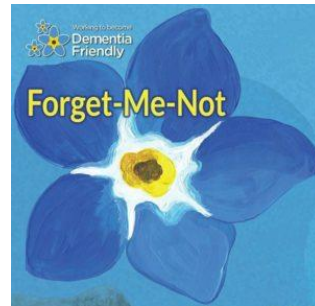
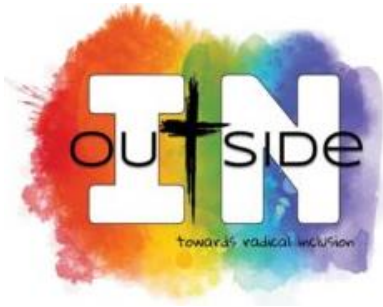
St Luke's holds regular services of divine worship and occasional offices. These are offered during the week and throughout the year, which the community finds socially beneficial and spiritually uplifting. As an inclusive church, the PCC ensures that all services are provided in meaningful ways; the sacraments are rooted in Scripture that declares all God's children are loved. Together, the church community explores what this means for St Luke's and the wider Church.

Before the vacancy the church's worship included:

- **Sunday services**, in accordance with the Canons of the Church of England, with additional time for reflection during the service and a time for refreshments and socialisation afterwards;
- **Morning prayer**, on some week-day mornings;
- **Mid-week Eucharist**, on some Wednesday evenings;
- **Forget-Me-Not**, a simple service for those living with dementia and their carers, with a chance for refreshments and socialisation afterwards;
- **4everyone**, a monthly short, fun service for families with young children.
- **outsideIN**, a monthly Eucharist or service of prayer held on the first Saturday of every month, serving people who identify as LGBTQ+, their friends, and all who are committed to inclusion.

While in vacancy some services have been suspended due to the lack of staff to cover these services.

Both ordained and lay members of the congregation also provided spiritual direction, prayer, study groups, and other forms of worship on regular occasions.



Occasional Offices

In addition to regular and routine services, St Luke's enables the Parish and others to celebrate and give thanks to God at the milestones of a person's journey through life. This is conducted through baptism, in which we give thanks to God for the gift of a new child and commit them to the church community; the public declarations of love and the exchanging of the vows of marriage; and enabling at funerals the expression of families' grief in the loss of their loved ones, and the sure hope of the resurrection of the dead and the commendation of the dead into the hands of God.

During 2023 St Luke's was able to celebrate 7 baptisms, 1 service of thanksgiving for a child, 0 weddings, and conduct 4 funeral services.



MISSION AND EVANGELISM

St Luke's is committed to the mission of the Church of England as expressed in the Five Marks of Mission:

- **Tell** – to proclaim the Good News of the Kingdom;
- **Teach** – to teach, baptise and nurture new believers;
- **Tend** – to respond to human need by loving service;
- **Transform** – to transform unjust structures of society, to challenge violence of every kind, and pursue peace and reconciliation; and,
- **Treasure** – to strive to safeguard the integrity of creation and sustain and renew the life of the earth.

St Luke's main aim in mission and evangelism is to enable everyone to live out their faith as part of our worshipping community through worship and prayer, the provision of pastoral care, outreach work, and promoting inclusion, affirmation and celebration..

Children and Youth Work

St. Luke's children's groups include Explorers, for children aged 3 to 11, which meets regularly on a Friday evening from 5 to 6pm with about 10 children attending each week. Pathfinders, for children aged 10 to 18, meets once every half term for an activity followed by supper and a time of worship. Pathfinder Weekend Away took place in June 2023 at The Emmaus Centre near Scarborough.

On a Sunday morning, during the 10am communion service, children go into the children's chapel during the sermon and intercessions for their own teaching and activities. There were special family services on a morning throughout the year including Mothering Sunday, Easter, Harvest and the Crib service which the children helped at in various ways.

St. Luke's activity week restarted in 2023 when we ran 'Joust a Minute' for four mornings in August. The theme this year was knights, castles and kings. Around 28 children joined us for 3 hours of fun each morning including listening to Bible stories, doing craft activities, playing games and singing.

St Luke's Toddler group restarted at the start of 2023 and runs every Monday morning.

Green and Environmental Work

In keeping with the Church of England's commitment to treasure and safeguard God's creation, the PCC operates and participates in green and environmental initiatives to sustain and renew the life of the earth.

The Church of England's National Environmental Working Group (EWG), in line with UK Government policy, is working towards the target of net zero carbon emissions by 2030, and those parts of the Church that can move faster are strongly encouraged to do so.

A major piece of work this year has been to commit to working towards net zero carbon, following the Church of England Routemap to Net Zero Carbon by 2030. After an explanatory presentation to explain our responsibilities and where we stand as a church, the PCC agreed to commit to following the Routemap and doing the best we can to reduce our energy use. We are required to record our gas and electricity usage using the CofE Energy Footprint Tool which allows us to monitor progress annually. Our initial score shows we use energy efficiently despite our inefficient

buildings. Completion of the Hall project will make a big difference. Now that we have a baseline, we can check our progress in reducing our energy use. Over the last year gas usage has reduced by 20% and electricity by 6%. However, we have held fewer services during vacancy. Even so, we are on the way to a greener future.

In terms of Eco-Church we have reached Gold in two categories – Worship and Teaching, and Land. A new Hall would probably get us to Gold in the Buildings category. In the meantime, undertaking a personal Lifestyle Audit using a simple tool is one of the easier things a Gold church commits to. St Luke's, York is now registered on Creation Care, which is the online portal for congregation members to undertake the lifestyle and energy use audits. We will be starting this.

We enjoyed a visit to the Homestead in August to count butterflies and look for bugs and in December we held another Christmas Fair crafting evening. We hope to provide more cycle racks at church and plant more trees in Knapton Wood when the next dates are released.

We continue to build links with other eco churches in York and keep in touch with York Environment Forum.

Communications

Communicating St Luke's faith, worship, aims, and activities is a year-round activity, and the church is grateful to those who keep it going. Individuals work hard to produce posters, flyers, leaflets, and more – as well as compiling, designing, arranging, printing, and distributing our widely-admired Grapevine magazine and monthly Grapevine Lite. In addition they maintain the website and St. Luke's Facebook page and the St. Luke's Facebook Community Group as well as having an email distribution list (following GDPR) to communicate with members of the congregation.

Community Engagement

Community outreach at St Luke's has been predominately around Luke's Larder. From Feb 2023 to Feb 2024, we have served 3367 customers and the number of people for whom food was collected came to 6,135.

We are incredibly grateful for the support from our local councillors and for the Ward Funding of £2,000 towards paying our annual Fareshare subscription. In addition to the food, we collect from Tesco, Sainsburys, Aldi, Farmfoods and KFC the Fareshare deliveries provide fresh, chilled, and frozen food for us to distribute. We are also very thankful to those who donate each month to the Larder via church funds and via the crate at the back of church to support us. Our customers are a mixture of working families, households where there is disability, grandparents feeding grandchildren more than twice a week, lone householders, pensioners, young people who have emerged from the care system into independent living, ex-service personnel, refugees, and others whose income means they struggle to make ends meet. Up to 25% of those fed are under the age of 16 and since September we have seen an increase in refugees accessing the Larder.

The Larder meets more than the need for food and with the connections we have been able to form in the Parish and wider Ward enables us to facilitate a variety of the needs in our community.

Our links with the Community Co-ordinator Anna Harrison and our PCSO's have been invaluable.

We continue to collaborate with the Travellers Trust and are very grateful for the continued weekly support of provisions we receive from the Clifton Methodist Church.

'Joyful Connections' café meets regularly every Friday morning providing a warm space and friendship for the people who attend and Tuesday Club runs every Tuesday afternoon with a chance for a game of bingo and tea and chat.

The church trusts and prays that it will continue to be able to meet the needs of the community.

Spiritual Enrichment and Nurture

St Luke's recognises it is the responsibility of everyone to recognise and encourage all that God is about amongst us. Time should be set aside to pray regularly.

Prayer support by the prayer team continues, with individual requests coordinated and shared in confidence with the team. Other activities this year include prayer walks around the parish, joining other churches to pray for all churches, schools and community projects.

St Luke's commitment to spiritual nurture and enrichment extends to all church groups, activities, events, and conversations.

Welcome and Inclusion

St Luke's is committed to the radical inclusion of all God's children in its worship and activities. St Luke's is registered with the Inclusive Church network.

The welcome team continue to be a key part of the warm and inclusive welcome that people receive at St Luke's. People are welcomed when they come into the building and this is followed up by offering to accompany them to the hall after the service and ensure they have an opportunity to chat to others.

We have created a carpeted area for families with young children including age-appropriate toy bags, some based on Bible stories so that they and their parents/carers can be included in the services.

A calm low stimulus space is available for those who need it. Signing of songs at some services has enabled those with additional needs to be included and celebrated.

St Luke's outsideIN services provide a new worshipping community for LGBT+ people, their families and friends and anyone who wants to belong to an inclusive and loving community. This group continues to grow.

The church remains committed to sponsoring York Pride, alongside other Church of England churches, and those of different denominations (ecumenical churches) in York.

The PCC express their gratitude to the Welcome and Inclusion Team for their hard work.

PASTORAL CARE

St Luke's provides pastoral care across the Ecclesiastical Parish in various ways. Everyone who regularly worships at St Luke's is well known to the PCC and Churchwardens, and their pastoral needs can be identified, and support offered.

We have a Deacon and Authorised Lay Minister with specific responsibility for pastoral care and worship, and they provide a listening ear and outreach to the community, as well as the provision of prayer and the sacraments.

WORK WITHIN THE CHURCH OF ENGLAND

The three Deanery Synod Representative members of the PCC sit on the Deanery Synod for York Deanery. The Deanery Synod considers growth, mission, evangelism, and other matters which concern churches in the city centre and local area. This provides the PCC with an important link between St Luke's and the wider work of local churches.

The Deanery Synod met three times during the year. The four goals of the deanery plan "Living Christ's Story" – becoming more Christlike, gaining younger and more diverse church members, reaching out to those who don't know Jesus, and transforming our structures and finances were the main focus for discussion. The Dioceses are also looking at environmental issues.

ECUMENICAL RELATIONS

St Luke's works with churches of other Christian denominations for certain projects throughout the year. Under the banner of Christians at Pride we join with other Church of England churches and York Central Methodists in support of York Pride. The PCC remains committed to working alongside other Christians, and other religious groups, to promote inclusion and affirmation.

VOLUNTEERS AND LAY WORKERS

The PCC is grateful that it has been supported by numerous volunteers over the year, who together make the church a praying, caring, and sharing presence in the Ecclesiastical Parish and beyond. The PCC recognises that without the work of the church's volunteers, it could not operate such a welcoming and inclusive church.

Authorised Lay Ministers

We have two Authorised Lay Ministers. These individuals are licensed and permitted to visit parishioners, administer the reserved sacrament to the sick and housebound, undertake hospital and bereavement visits, assist the celebrant at services in sheltered accommodation and care homes in the parish, administer the chalice at Holy Communion, and be part of the prayer and ministry team.

Sidespeople

Sidespeople are an office established under Canon E2 (Of sidesmen or assistants to the churchwardens), who are appointed by the parochial church council to "promote the cause of true religion in the Parish and to assist the churchwardens in the discharge of their duties in maintaining order and decency in the church and churchyard, especially during the time of divine service".

At St Luke's, specific duties include welcoming people when they come into church, and enabling services to take place in good order.

Other Volunteers

St Luke's does not employ any staff, and so all the church's activities are carried out on a voluntary basis. This includes children and youth workers, the PCC Secretary and Treasurer, a church hall secretary, pastoral support, prayer loop volunteers, eucharistic assistants, and all members of the groups mentioned in this report which contribute to and facilitate the life and work of the church.

BUILDINGS WORK

Checks on the condition of the high-level windows were carried out by a recommended glazier and identified repairs were completed at a cost in the region of £4500. Some repointing was completed on the church and guttering and downpipes cleared.

St Luke's Community Hub Project

Having explored several potential options which have come to nothing, the priority recently has been to test out what we could achieve with the money we have available. A plan is emerging which would enable us to create all of the facilities that the original design envisaged, but at reduced cost. We hope to be able to achieve this by extending the hall using the same construction as the existing building, and then bringing the extended building up to a good standard using a combination of renewal and refurbishment depending on what is required.

FINANCIAL REPORT

INDEPENDENT EXAMINER'S REPORT

Report to the trustees/members of THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF ST LUKE THE EVANGELIST YORK

On the accounts for the year ended 31 December 2022

Charity number 1185606

Set out on pages 20 – 28

Responsibilities and basis of report I report my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2023.

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 I am qualified to undertake the examination by being a qualified member of The Chartered Institute of Management Accountants and The Association of International 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.

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Date:

28th March 2024



St Luke's, York -

Charity Registration Number: 1185606

Name: Steve Logun

Relevant professional qualification(s) ACMA CGMA AAIA

Address:

17 Derek Vivian Close
Pocklington
East Riding of Yorkshire
YO42 2PL

OVERVIEW

At the close of 2023, the church finances are in a fairly healthy position. Energy prices have remained high, although our usage has reduced, which has helped mitigate this. While the combined cost of gas and electricity for 2023 was £8,249, if we had used what we used in 2022 that figure would have been more like £11,000! We should celebrate this and recognise the benefits to the planet as well as to the church finances.

INCOME

Planned Giving (via bank payments, weekly envelopes and the Parish Giving Scheme) has seen a modest increase over 2023, although this is below inflation. This increase has come from a few new regular givers and a couple of givers increasing their donations, although we have lost one or two donors this year as well.

St Luke's Tide Gift Day saw donations of £7,425 which this year was allocated to the General Fund.

We received a grant of £15,000 from the Feoffees of St Michael's Spurriergate for the Community Hub Project. We were also awarded Ward Committee grants for Activity Week (£575) and Joyful Connections (£400). We did not receive any legacies this year.

Regular giving for Luke's Larder is now £225 per month, most of which is eligible for Gift Aid. This is in addition to the £1,010 cash given in 2023 at the Wednesday sessions. The Gift Aid claim resulted in an extra £918.75.

The Gift Aid claim on 2023 donations (including the Parish Giving Scheme and the Gift Aid Small Donations Scheme) amounted to a payment from HMRC of £17,751.72. Gift Aid is now being claimed three times per year (in April, August & December).

This year saw further post-Covid recovery of hall lettings with takings of £3,397, which is an increase of £1,532 compared to 2022. Several events over the year, including the Christmas Fayre and the Quiz Night, generated just under £1,500 for church funds.

EXPENDITURE

As always, the largest item of expenditure is the Freewill Offering which this year was £55,560, which was a slight reduction on the previous year. Following discussions in the PCC and with guidance from the Diocese, the offering for 2024 will be increased to £59,160.

Following a mid-year discussion, at which point the finances were looking healthier than anticipated, St Luke's convention of charitable giving was resumed. For 2023, the PCC deemed it appropriate to give 5% of the unrestricted finances from 2022, which resulted in £4,660 being shared between six chosen charities. It is the PCC's intent to give 10% in 2024.

Other significant outlays were to repair the Hall roof (£1,600) and maintenance needed on the boiler and electrical systems (£1,102).

Gas and electricity costs for the Church and Hall amounted to £8,249 for the year, which is an increase of £1,814 over the previous year's bills.

RESERVES

RESERVES POLICY

The Diocesan benchmark for Reserves is four times the monthly unrestricted expenditure which would mean a level of around £31,900. Reserves are made up of the money remaining at the end of the financial year, which is set aside so that if all our income dried up immediately, we could meet our financial obligations for four months – essentially a rainy-day fund. We currently have Reserves of £29,727, meaning we have almost met this benchmark for the first time in several years.

STATEMENT OF GOING CONCERN

The accounts were prepared on a going concern basis. The Trustees have concluded that the charity is a going concern.

The church can meet its operating costs and holds a suitable amount in total reserves. Whilst its benchmark for reserves is against the general reserves, the legacy reserves can be utilised to meet operational needs.

The church intends to use the legacy reserve for building works on the church and church hall. The church had experienced a decline in giving during the coronavirus pandemic, and a loss of income from the church hall lettings. The church is promoting the use of electronic giving to supplement lost loose plate collection income and other donations. The church can apply to the Diocese of York for financial support if necessary.

Sally Maybridge, Treasurer

Sally's signature to be inserted here

RECEIPTS AND PAYMENTS ACCOUNT

	Unrestricted funds	Designated funds	Restricted funds	Endowment funds	Total funds	Prior year total funds
Receipts						
Voluntary Income						
Planned Giving	61,801	—	2,755	—	64,556	60,086
Collection at services	1,302	—	20	—	1,322	2,088
Donations	1,045	—	1,437	—	2,482	30,571
Gift Day	7,425	—	—	—	7,425	5,840
Grants	—	—	15,975	—	15,975	4,150
All other giving/voluntary income	1,215	—	—	—	1,215	20,679
Gift Aid recovered	14,108	—	(33)	—	14,074	26,858
Activities for Generating Funds	4,909	—	50	—	4,959	5,011
Investment income	473	1,199	2,182	—	3,855	3,992
Church Activities	434	100	1,361	—	1,895	1,693
Other incoming resources	—	—	—	—	—	—
Total receipts	92,716	1,299	23,746	—	117,762	160,972
Payments						
Church activities	—	—	4,238	—	4,238	—
Free Will Offering	55,560	—	—	—	55,560	61,560
Clergy and Staffing	975	—	—	—	975	1,757
Church running expenses	15,056	8	4,606	—	19,671	15,945
Hall running costs	3,885	—	—	—	3,885	3,114
Church Major Repairs	4,162	—	3,055	—	7,218	103,171
Hall Major Repairs	2,329	—	—	—	2,329	—
Mission giving & donations	4,660	—	—	—	4,660	—
Cost of generating funds	1	—	—	—	1	5
Costs of generating voluntary income	—	—	—	—	—	24
Fundraising Trading costs	285	—	—	—	285	1,019
Investment management costs	—	—	—	—	—	469
New Building Work	—	2,806	826	—	3,632	—
Total payments	86,916	2,815	12,726	—	102,458	187,069
Excess of receipts over payments before transfer	5,799	(1,515)	11,020	—	15,303	(26,096)
Transfers						
Gross transfers between funds - in	—	—	766	—	766	7,091
Gross transfers between funds - out	—	(766)	—	—	(766)	(7,091)
Excess of receipts over payments before other gains / losses	5,799	(2,281)	11,786	—	15,303	(26,096)
Net movement in funds	5,799	(2,281)	11,786	—	15,303	(26,096)
All assets at 01 January 2023	23,927	240,948	118,049	—	382,925	409,021
All assets at 31 December 2023	29,727	238,666	129,835	—	398,229	382,925
Represented by						
Unrestricted						
General fund	29,727	—	—	—	29,727	23,927
Designated						
Building Fund (Chairs)	—	—	—	—	—	—
Legacy Fund	—	238,399	—	—	238,399	240,648
Mission	—	166	—	—	166	300
Youth Fund	—	100	—	—	100	—
Restricted						
Building Fund (Chairs)	—	—	5,966	—	5,966	5,833

CAC Travel	—	—	—	—	—	—
Community Fund	—	—	680	—	680	280
Community Hub	—	—	120,119	—	120,119	106,913
Flower Fund	—	—	(14)	—	(14)	47
Green Group Fund	—	—	188	—	188	218
Luke's Larder	—	—	2,074	—	2,074	1,686
Magazine Fund	—	—	—	—	—	2,460
Mission	—	—	—	—	—	(24)
Mums & Toddlers	—	—	—	—	—	—
Music Fund	—	—	436	—	436	479
PRIDE	—	—	—	—	—	—
Sunnydene	—	—	—	—	—	—
Youth Fund	—	—	383	—	383	154

FUND MOVEMENT BY TYPE

	Opening	Incoming	Outgoing	Transfers	Gains/losses	Journals	Closing
General - General fund							
Unrestricted	23,927	92,716	86,916	—	—	—	29,727
Sub-total for General	23,927	92,716	86,916	—	—	—	29,727
COMMHUB - Community Hub							
Restricted	106,913	16,445	3,881	641	—	—	120,119
Sub-total for COMMHUB	106,913	16,445	3,881	641	—	—	120,119
Legacy - Legacy Fund							
Designated	240,648	1,199	2,806	(641)	—	—	238,399
Sub-total for Legacy	240,648	1,199	2,806	(641)	—	—	238,399
BUILDING - Building Fund (Chair							
Restricted	5,833	133	—	—	—	—	5,966
Sub-total for BUILDING	5,833	133	—	—	—	—	5,966
COMMUNITY - Community Fund							
Restricted	280	400	—	—	—	—	680
Sub-total for COMMUNITY	280	400	—	—	—	—	680
Mission - Mission							
Designated	300	—	8	(124)	—	—	166
Restricted	(24)	—	—	24	—	—	—
Sub-total for Mission	275	—	8	(100)	—	—	166
Lukeslard - Luke's Larder							
Restricted	1,686	4,626	4,238	—	—	—	2,074
Sub-total for Lukeslard	1,686	4,626	4,238	—	—	—	2,074
PRIDE - PRIDE							
Restricted	—	—	100	100	—	—	—
Sub-total for PRIDE	—	—	100	100	—	—	—
FLOWER - Flower Fund							
Restricted	47	—	61	—	—	—	(14)
Sub-total for FLOWER	47	—	61	—	—	—	(14)
Green - Green Group Fund							
Restricted	218	(30)	—	—	—	—	188
Sub-total for Green	218	(30)	—	—	—	—	188
MAGS - Magazine Fund							
Restricted	2,460	—	2,460	—	—	—	—
Sub-total for MAGS	2,460	—	2,460	—	—	—	—
MUSIC - Music Fund							
Restricted	479	53	96	—	—	—	436
Sub-total for MUSIC	479	53	96	—	—	—	436
YOUTH - Youth Fund							

Designated	—	100	—	—	—	—	100
Restricted	154	2,116	1,888	—	—	—	383
Sub-total for YOUTH	154	2,216	1,888	—	—	—	483
SUNNY - Sunnydene							
Restricted	—	—	—	—	—	—	—
Sub-total for SUNNY	—	—	—	—	—	—	—
Grand total	382,925	117,762	102,458	—	—	—	398,229

STATEMENT OF ASSETS AND LIABILITIES

	General	Designated	Restricted	Endowment	This year	Last year
Current assets - Cash at bank and in hand						
Bank current account -	21,850	(2,539)	38,977	—	58,287	24,676
Bank current account -	—	—	—	—	—	(928)
Totals	21,850	(2,539)	38,977	—	58,287	23,747
Current assets - Debtors						
Accounts Receivable -	166	—	—	—	166	18,287
Totals	166	—	—	—	166	18,287
Current assets - Investments						
CCLA (CBF) deposit account -	10,570	69,480	5,966	—	86,017	86,338
Flagstone Investment Management -	—	171,726	—	—	171,726	171,726
Methodist Chapel Aid Ltd -	—	—	85,000	—	85,000	85,000
Totals	10,570	241,206	90,966	—	342,743	343,064
Liabilities - Agency accounts						
Agency collections -	—	—	(115)	—	(115)	(366)
Totals	—	—	(115)	—	(115)	(366)
Liabilities - Creditors: Amounts falling due in one year						
Loans received -	—	—	—	—	—	100
Accounts Payable -	2,860	—	223	—	3,083	2,440
Totals	2,860	—	223	—	3,083	2,540
Grand total	29,727	238,666	129,835	—	398,229	382,925

ANALYSIS OF RECEIPTS AND PAYMENTS

					Total	
Unrestricted	Designated	Restricted	Endowment	This year	Last year	

INCOME AND ENDOWMENTS

Voluntary Income - Planned Giving

Gift Aid - Bank	47,391	—	—	—	47,391	47,974
Gift Aid - Parish Giving Scheme	9,395	—	—	—	9,395	9,027
Gift Aid - Envelopes	865	—	—	—	865	835
Other Planned / Not Gift Aid - Bank	4,150	—	—	—	4,150	2,250
Luke's Larder - Bank Transfer	—	—	2,755	—	2,755	—
Total	61,801	—	2,755	—	64,556	60,086

Voluntary Income - Collection at services

Loose plate collections	1,302	—	20	—	1,322	2,088
Total	1,302	—	20	—	1,322	2,088

Voluntary Income - Donations

Donations Appeals etc. - Gift Aid	687	—	346	—	1,033	29,303
Donations, Appeals etc. - Other	357	—	16	—	373	982
Donations SumUp	—	—	—	—	—	285
Luke's Larder - Loose Plate	—	—	1,075	—	1,075	—
Total	1,045	—	1,437	—	2,482	30,571

Voluntary Income - Gift Day

Regular Gift Days - Gift Aid	6,425	—	—	—	6,425	3,760
Regular Gift Days - Other	1,000	—	—	—	1,000	2,080
Total	7,425	—	—	—	7,425	5,840

Voluntary Income - Grants

Recurring grants	—	—	—	—	—	1,650
Non-recurring one-off grants	—	—	15,975	—	15,975	2,500
Total	—	—	15,975	—	15,975	4,150

Voluntary Income - All other giving/voluntary income

Giving through church boxes	135	—	—	—	135	—
Refreshments	1,080	—	—	—	1,080	881
Legacies	—	—	—	—	—	19,798
Total	1,215	—	—	—	1,215	20,679

Voluntary Income - Gift Aid recovered

Tax recoverable on Gift Aid	11,759	—	(33)	—	11,725	24,604
Tax Recovered - Parish Giving Scheme	2,348	—	—	—	2,348	2,254
Total	14,108	—	(33)	—	14,074	26,858

Activities for Generating Funds

Other funds generated	12	—	—	—	12	—
Coffee Mornings, Concerts & other events	1,430	—	50	—	1,480	3,064
Bookstall sales - fund raising	—	—	—	—	—	7
Church hall lettings - fund raising	3,397	—	—	—	3,397	1,865
Magazine income - advertising	—	—	—	—	—	—
Photocopy sales	70	—	—	—	70	75
Total	4,909	—	50	—	4,959	5,011

Investment income

Bank and building society interest	473	1,199	2,182	—	3,855	3,992
Total	473	1,199	2,182	—	3,855	3,992

Church Activities

Fees for weddings and funerals	434	—	—	—	434	1,315
Bookstall sales to promote objectives	—	—	—	—	—	—
Church hall lettings - objectives	—	—	—	—	—	—
Parish magazine sales	—	—	—	—	—	—
Children's Work	—	—	125	—	125	20

Pathfinder Weekend	—	—	1,150	—	1,150	358
Activity Week	—	100	86	—	186	—
Total	434	100	1,361	—	1,895	1,693

Other incoming resources

Insurance claims	—	—	—	—	—	—
Total	—	—	—	—	—	—
INCOME TOTAL	92,716	1,299	23,746	—	117,762	160,972

EXPENDITURE

Church activities

Luke's Larder	—	—	4,238	—	4,238	—
Total	—	—	4,238	—	4,238	—

Church activities - Free Will Offering

Free Will Offering	55,560	—	—	—	55,560	61,560
Total	55,560	—	—	—	55,560	61,560

Church activities - Clergy and Staffing

Assistant staff costs	—	—	—	—	—	—
Salary of Organist	975	—	—	—	975	1,700
Working expenses of incumbent	—	—	—	—	—	—
Council tax	—	—	—	—	—	—
Vicarage Costs	—	—	—	—	—	—
Vicarage Water	—	—	—	—	—	—
Vicar's telephone	—	—	—	—	—	—
Visiting speakers	—	—	—	—	—	57
Total	975	—	—	—	975	1,757

Church activities - Church running expenses

Training	—	—	—	—	—	—
Parish training and mission	—	8	100	—	108	2,658
Children's Work	—	—	382	—	382	99
Activity Week	—	—	606	—	606	—
Pathfinder Weekend	—	—	898	—	898	582
Church running - insurance	2,391	—	—	—	2,391	2,226
Church office - telephone/broadband	100	—	—	—	100	268
Photocopier Service	509	—	—	—	509	477
Photocopier Lease	1,060	—	—	—	1,060	1,060
Organ / piano tuning	265	—	—	—	265	265
Church running - maintenance	1,964	—	—	—	1,964	945
Cleaning	34	—	—	—	34	—
Upkeep of services	924	—	157	—	1,082	655
Upkeep of churchyard	—	—	—	—	—	78
Administration	244	—	—	—	244	602
Refreshments	423	—	—	—	423	350
Church running - electric	1,819	—	—	—	1,819	960
Church running - gas	5,300	—	—	—	5,300	4,037
Church running - water	—	—	—	—	—	—

Church running - heating and lighting	—	—	—	—	—	—
Magazine expenses	—	—	2,460	—	2,460	675
Governance costs examination/audit fee	17	—	—	—	17	—
PCC Meeting Costs	—	—	—	—	—	—
Total	15,056	8	4,606	—	19,671	15,945

Church activities - Hall running costs

Hall running - electricity	—	—	—	—	—	—
Hall running - gas	2,281	—	—	—	2,281	1,438
Hall running - insurance	1,248	—	—	—	1,248	1,162
Hall running - maintenance	66	—	—	—	66	233
Hall running - water	290	—	—	—	290	150
Hall running - heating and lighting	—	—	—	—	—	130
Total	3,885	—	—	—	3,885	3,114

Church activities - Church Major Repairs

Church major repairs - structure	4,162	—	—	—	4,162	—
Church major repairs - installation	—	—	3,055	—	3,055	103,171
Church interior and exterior decorating	—	—	—	—	—	—
Total	4,162	—	3,055	—	7,218	103,171

Church activities - Hall Major Repairs

Hall + major repairs - structure	2,329	—	—	—	2,329	—
Hall + major repairs - installation	—	—	—	—	—	—
Hall + interior and exterior decorating	—	—	—	—	—	—
Total	2,329	—	—	—	2,329	—

Church activities - Mission giving & donations

Giving to Missionary Societies	930	—	—	—	930	—
Giving - Relief and Development Agencies	930	—	—	—	930	—
Home Mission	2,100	—	—	—	2,100	—
Secular Charities	700	—	—	—	700	—
Total	4,660	—	—	—	4,660	—

Cost of generating funds

Bank Charges and Fees	1	—	—	—	1	5
Total	1	—	—	—	1	5

Cost of generating funds - Costs of generating voluntary income

Fees paid to fund raisers	—	—	—	—	—	—
Costs of applying for grants	—	—	—	—	—	—
Costs of stewardship campaign	—	—	—	—	—	24
Total	—	—	—	—	—	24

Cost of generating funds - Fundraising Trading costs

Costs of Coffee Mornings & other events	285	—	—	—	285	506
Sunnydene Payments	—	—	—	—	—	512

Bookstall costs		—	—	—	—	—	—
Total	285	—	—	—	—	285	1,019

Cost of generating funds - Investment management costs

Investment management costs		—	—	—	—	—	469
Total	—	—	—	—	—	—	469

New Building Work

New building Church	—	—	—	—	—	—
New building Hall	—	2,806	826	—	3,632	—
Total	—	2,806	826	—	3,632	—
EXPENDITURE TOTAL	86,916	2,815	12,726	—	102,458	187,069
GRAND TOTAL	5,799	(1,515)	11,020	—	15,303	(26,096)

Financial Report approved by the Trustees on 6th July 2024

Signature:



Full Name: Mrs Colette Longbottom

Position: Acting PCC Chair

Date: 06.07.24

The Trustees declare that they have approved the Trustees' Report above.

Signature:



Full Name: Mrs Colette Longbottom

Position: Acting PCC Chair

Date: 06.07.24

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES



Trustees' Annual Report

for the period

1st January 2022 to 31st December 2022

Charity

**THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF
ST LUKE THE EVANGELIST YORK**

Charity Registration Number

1185606

Page | 1



St Luke's, York – Trustees' Annual Report 2022

Charity Registration Number: 1185606



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ADMINISTRATIVE INFORMATION

CONTACT INFORMATION

Address St Luke the Evangelist Church
Burton Stone Lane
YORK YO30 6DG

Phone No. 07584 551915

Email treasurer@stlukesyork.org

Website <https://www.stlukesyork.org>

CHARITY TRUSTEES

The charity's Trustees are the ex officio, elected, and co-opted members of the Parochial Church Council. Trustees are elected annually at the Annual Parish Meeting (Wardens) and the Annual Parochial Church Meeting (PCC Members).

PCC members who have served from 1st January 2022 until the date this report was approved were:

Ex Officio

Incumbent (Chair)

Readers Lynn Anne Comer

Wardens

Colette Anne Longbottom
David Titterington-Cook

Acting Chair from April 2021

Deanery Synod Representatives

Sally Christine Maybridge
Christina Jane Pownall
Edwin Leonard Schofield

from April 2022

Elected Members

Stephen Michael Adams
Alfreda Alderson
Mark Justin Comer
Elizabeth Anne Davies
Stewart Andrew Graham
Jennifer Gwynne
Harriet Rachel Leigh
Anne Kathryn Lockett

Phoebe Power
Elizabeth Marjorie Sharp
Gillian Mary Tyler
Elizabeth Anne Village

from April 2022

Co-opted Members

Deacon Margaret Elizabeth Carrington

OTHER CHARITY OFFICERS (NON-TRUSTEES)

Treasurer David Boyd

GOVERNING DOCUMENT

The charity's principal governing document is the Parochial Church Council Powers Measure (1956) as amended *and* Church Representation Rules that came into force on 02 January 1956 and were revised in 2020.

CHARITABLE OBJECTIVES

The charity's stated objective is promoting in the Ecclesiastical Parish the whole mission of the Church.

BANKERS

The charity's funds are invested in four banks and investment groups as follows.

The Cooperative Bank	Flagstone Investment Management	CCLA Investment Management
PO Box 250	1 st Floor, Clareville House	Senator House
Delf House	26-27 Oxendon Street	85 Queen Victoria Street
Skelmersdale	London	London
WN8 6WT	SW1Y 4EL	EC4V 4ET

Methodist Chapel Aid
1 Telford Terrace
Albermarle Road
York
YO24 1DQ

INTRODUCTION

The Parochial Church Council presents their report and accounts for the year ended 31st December 2022. The financial statements comply with the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) (effective 1 January 2019).

The report covers the year 2022 between 01 January 2022 and 31 December 2022. However, the election of the PCC, who are the charity's trustees, took place at the church's Annual Parish and Annual Parochial Church Meetings (APCM) on 3rd April 2022. The church's financial year covers the calendar year of 2022 as required for all Anglican churches in the Diocese of York. The accounts for 2022 are the latest full set of accounts for the period of this Trustees Report.

St Luke's continued to demonstrate that it is indeed a praying, caring, sharing church willing to live out its vision in the community it serves.

Work on the Community Hub project continued, although at a slower pace due to the financial restraints.

Luke's Larder continued to grow and is a much-needed service in the community

The PCC is committed to exploring new ways to serve the church's parish and congregation.

STRUCTURE, GOVERNANCE, AND MANAGEMENT

St Luke's is an Ecclesiastical Parish Church in the Church of England, part of the Diocese of York. It is situated about a mile north of York Minster, standing on the corner of Burton Stone Lane and Shipton Street. The Parish extends eastwards from A19 Clifton with Burton Stone Lane as its spine. It is bounded by the York-to-Scarborough railway line to the east, and Kingsway North and Burton Green to the west and north.



THE PAROCHIAL CHURCH COUNCIL (THE TRUSTEES)

The Parochial Church Council (PCC) is a body corporate under the *Parochial Church Councils (Powers) Measure 1956* and the *Church Representation Rules* (revised in 2020). It is a charity registered with the Charities Commission (Registration Number 1185606).

Inter alia, the PCC is responsible for making decisions on all matters of general concern and importance to the Parish, including deciding how the funds of the PCC are to be spent.

The method of appointment and election of PCC members, including *ex officio* members, is set out in the *Church Representation Rules*. The membership of the PCC at St. Luke's is set out above on pages 4 and 5.

Elections for Churchwardens, PCC Members, and Deanery Synod Representatives takes place annually. In 2022, these elections took place on 3rd April 2022.

Elected members of the PCC serve a one- or three-year term and may stand for re-election at the end of their term. Deanery Synod representatives are elected for the duration of the Synod's triennium. Approximately one third of the elected membership of the PCC becomes vacant every year. Any person on the Electoral Roll of the Parish for more than six months preceding an election may stand to be a member of the PCC.

The PCC met four times during the year, with extra business conducted at seven additional short meetings and two online meetings via email.

Given the wide responsibility of the mission and ministry, and to encourage the growth of the church, several groups exist from time to time to be responsible for a particular aspect of Parish life. The buildings project group continued in 2022 to look at specific plans for the church and church hall buildings. All groups report to the PCC.

From November 2020 no member of the PCC undertook the role of Treasurer, and so the PCC resolved to appoint a non-member to be the church's Treasurer. This continued until the end of 2022.

RISK MANAGEMENT

The PCC is resolved to take appropriate steps to manage and mitigate risk through robust governance. These steps include regular monitoring of risk and identifying means to mitigate risks. This includes data protection compliance, financial monitoring including a reserves policy, safeguarding policies, and health and safety policy and risk assessments. Appropriate financial systems and procedures have been established to manage and identify financial risks. Budgetary and accounting risks are minimised by continual scrutiny of the accounts by the PCC at its regular meetings, and financial summaries are routinely circulated to the PCC between meetings.

PUBLIC BENEFIT

The Trustees confirm that they have complied with the duty of Section 4 of the Charities Act 2006 to have due regard to the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives, and in planning activities and setting policies and priorities for the year ahead.

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).

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 charity's 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.

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 1993 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 PCC

Gillian Tyler, PCC Secretary

ACTIVITIES, MISSION, AND OBJECTIVES

St Luke's PCC works together, in promoting the Ecclesiastical Parish, and the whole mission of the Church of England – pastoral, evangelistic, social, and ecumenical. In addition to its stated charitable objective of promoting the Ecclesiastical Parish, the PCC has resolved that

- **We believe in one God: Father, Son, and Holy Spirit;**
- **We are a Christian family of people who worship and serve God; and,**
- **We are a praying community, committed to caring for one another and those in our community, and sharing God's love with everyone.**

The Rev Jackie Doyle-Brett resigned her role and left on 7th February 2021, leaving a vacancy which remains unfilled. The activities, mission and objectives are continued by the PCC with the Churchwardens taking responsibility, supported by retired clergy from the Diocese.

The PCC is also specifically responsible for maintaining St Luke's Church Hall in Shipton Street, York, which is located adjacent to the church building.

WORSHIP AND PRAYER

The PCC is committed to enabling as many people as possible to become part of the worshipping community of the church, as well as working to care for the residents of the whole Ecclesiastical Parish. The PCC maintains an overview of the governance of the parish, as well as its worship and missional activities, and appoints individuals and creates groups to help facilitate its mission.

Services

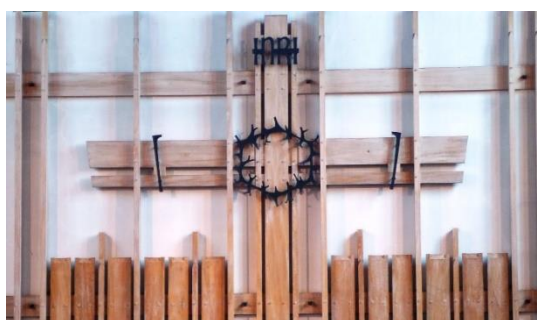
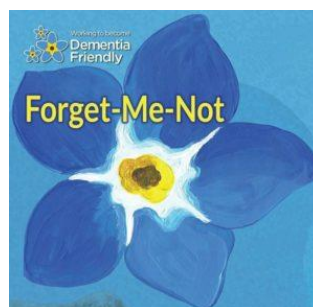
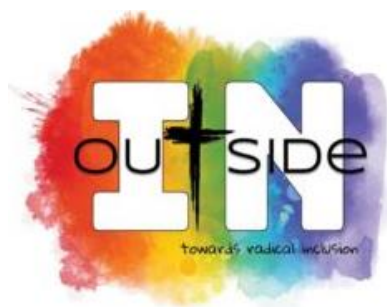
St Luke's holds regular services of divine worship and occasional offices. These are offered during the week and throughout the year, which the community finds socially beneficial and spiritually uplifting. As an inclusive church, the PCC ensures that all services are provided in meaningful ways; the sacraments are rooted in Scripture that declares all God's children are loved. Together, the church community explores what this means for St Luke's and the wider Church.

Before the vacancy the church's worship included:

- **Sunday services**, in accordance with the Canons of the Church of England, with additional time for reflection during the service and a time for refreshments and socialisation afterwards;
- **Morning prayer**, on some week-day mornings;
- **Mid-week Eucharist**, on some Wednesday evenings;
- **Forget-Me-Not**, a simple service for those living with dementia and their carers, with a chance for refreshments and socialisation afterwards;
- **4everyone**, a monthly short, fun service for families with young children.
- **outsideIN**, a monthly Eucharist or service of prayer held on the first Saturday of every month, serving people who identify as LGBTQ+, their friends, and all who are committed to inclusion.

While in vacancy some services have been suspended due to the lack of staff to cover these services.

Both ordained and lay members of the congregation also provided spiritual direction, prayer, study groups, and other forms of worship on regular occasions.



Occasional Offices

In addition to regular and routine services, St Luke's enables the Parish and others to celebrate and give thanks to God at the milestones of a person's journey through life. This is conducted through baptism, in which we give thanks to God for the gift of a new child and commit them to the church community; the public declarations of love and the exchanging of the vows of marriage; and enabling at funerals the expression of families' grief in the loss of their loved ones, and the sure hope of the resurrection of the dead and the commendation of the dead into the hands of God.

During 2022 St Luke's was able to celebrate 4 baptisms, 2 weddings, and conduct 6 funeral services.



MISSION AND EVANGELISM

St Luke's is committed to the mission of the Church of England as expressed in the Five Marks of Mission:

- **Tell** – to proclaim the Good News of the Kingdom;
- **Teach** – to teach, baptise and nurture new believers;
- **Tend** – to respond to human need by loving service;
- **Transform** – to transform unjust structures of society, to challenge violence of every kind, and pursue peace and reconciliation; and,
- **Treasure** – to strive to safeguard the integrity of creation and sustain and renew the life of the earth.

St Luke's main aim in mission and evangelism is to enable everyone to live out their faith as part of our worshipping community through worship and prayer, the provision of pastoral care, outreach work, and promoting inclusion, affirmation and celebration..

Children and Youth Work

St. Luke's children's groups include Explorers, for children aged 3 to 11, which meets regularly on a Friday evening from 5 to 6pm with about 10 children attending each week. Pathfinders, for children aged 10 to 18, meets once every half term for an activity followed by supper and a time of worship. Pathfinder Weekend Away took place in May 2022 at The Emmaus Centre near Scarborough.

On a Sunday morning, during the 10am communion service, children go into the children's chapel during the sermon and intercessions for their own teaching and activities. There were special family services on a morning throughout the year including Mothering Sunday, Easter, Harvest and the Crib service which the children helped at in various ways.

Green and Environmental Work

In keeping with the Church of England's commitment to treasure and safeguard God's creation, the PCC operates and participates in green and environmental initiatives to sustain and renew the life of the earth.

The Church of England's National Environmental Working Group (EWG), in line with UK Government policy, is working towards the target of net zero carbon emissions by 2030, and those parts of the Church that can move faster are strongly encouraged to do so.

Each month has been marked with a green event. We joined in with the Keep Britain Tidy spring litter pick and the Big Plastic count run by Greenpeace. Especially enjoyable was the summer national Butterfly Count at the Homestead - plus picnic lunch. We also took part in tree planting at St Nick's Environment Centre and at York Community Woodland. In September we ran 'A Passion for the Earth' day when the charity Green Christian and the Riding Lights drama group came to St. Luke's to invite us to discuss damage to the environment, lament and the release of hope. In December we gathered to make eco crafts and held a Recycle and Regift stall at the Christmas Fair.

A four-part Bible study from Operation Noah, 'Tenants of the King', was well attended and prompted some helpful theological reflection on our responsibilities towards planet and people and how we can respond with hope – one step at a time. We continue to build links with other eco churches in York and keep in touch with York Environment Forum.

Communications

Communicating St Luke's faith, worship, aims, and activities is a year-round activity, and the church is grateful to those who keep it going. Individuals work hard to produce posters, flyers, leaflets, and more – as well as compiling, designing, arranging, printing, and distributing our widely-admired Grapevine magazine and monthly Grapevine Lite. In addition they maintain the website and St. Luke's Facebook page and the St. Luke's Facebook Community Group as well as having an email distribution list (following GDPR) to communicate with members of the congregation.

Community Engagement

Community outreach at St Luke's has been predominately around Luke's Larder. 2022 saw an increase in demand which continues to rise. From the end of February 2022 until the end of February 2023 we had 2,675 customers, collecting food for 5,058 people.

A total of 96% of our customers come from the Clifton Ward but there is some change to this as we are seeing a few refugee families coming to us from their accommodation outside of the Ward.

Approximately 25% of those we feed are children under the age of 16 and we have seen an increase in the number of working couples and those with families, who are finding it increasingly difficult to make ends meet, using Luke's Larder.

Thanks to SF Innovations we have given out just under a hundred energy saving lightbulbs. York Energy Advice connected with some of our customers to enable them to obtain help with their energy bills.

'Joyful Connections' café meets regularly every Friday morning providing a warm space and friendship for the people who attend. During the last year there have been visits from Age UK, council officials and police to talk about home safety and what services are available. Information leaflets from the Local Area Coordinator are distributed through Joyful Connections.

The church trusts and prays that it will continue to be able to meet the needs of the community.

Spiritual Enrichment and Nurture

St Luke's recognises it is the responsibility of everyone to recognise and encourage all that God is about amongst us. Time should be set aside to pray regularly.

Prayer support by the prayer team continues, with individual requests coordinated and shared in confidence with the team. Other activities this year include prayer walks around the parish, joining other churches to pray for all churches, schools and community projects.

St Luke's commitment to spiritual nurture and enrichment extends to all church groups, activities, events, and conversations.

Welcome and Inclusion

St Luke's is committed to the radical inclusion of all God's children in its worship and activities. St Luke's is registered with the Inclusive Church network.

The welcome team continue to be a key part of the warm and inclusive welcome that people receive at St Luke's. People are welcomed when they come into the building and this is followed up by offering to accompany them to the hall after the service and ensure they have an opportunity to chat to others.

We have created a carpeted area for families with young children including age-appropriate toy bags, some based on Bible stories so that they and their parents/carers can be included in the services.

A calm low stimulus space is available for those who need it. Signing of songs at some services has enabled those with additional needs to be included and celebrated.

The adaptations to the church building were completed in 2022.

St Luke's outsideIN services provide a new worshipping community for LGBT+ people, their families and friends and anyone who wants to belong to an inclusive and loving community. This group continues to grow.

The church remains committed to sponsoring York Pride, alongside other Church of England churches, and those of different denominations (ecumenical churches) in York.

The PCC express their gratitude to the Welcome and Inclusion Team for their hard work.

PASTORAL CARE

St Luke's provides pastoral care across the Ecclesiastical Parish in various ways. Everyone who regularly worships at St Luke's is well known to the PCC and Churchwardens, and their pastoral needs can be identified, and support offered.

We have a Deacon and Recognised Parish Assistant with specific responsibility for pastoral care and worship, and they provide a listening ear and outreach to the community, as well as the provision of prayer and the sacraments.

WORK WITHIN THE CHURCH OF ENGLAND

The three Deanery Synod Representative members of the PCC sit on the Deanery Synod for York Deanery. The Deanery Synod considers growth, mission, evangelism, and other matters which concern churches in the city centre and local area. This provides the PCC with an important link between St Luke's and the wider work of local churches.

The Deanery Synod met three times during the year. The draft Deanery Plan was the main focus for discussion. The Dioceses are also looking at environmental issues and it was identified that St Luke's were leading in making many of the changes.

ECUMENICAL RELATIONS

St Luke's works with churches of other Christian denominations for certain projects throughout the year. Under the banner of Christians at Pride we join with other Church of England churches and York Central Methodists in support of York Pride. The PCC remains committed to working alongside other Christians, and other religious groups, to promote inclusion and affirmation.

VOLUNTEERS AND LAY WORKERS

The PCC is grateful that it has been supported by numerous volunteers over the year, who together make the church a praying, caring, and sharing presence in the Ecclesiastical Parish and beyond. The PCC recognises that without the work of the church's volunteers, it could not operate such a welcoming and inclusive church.

Recognised Parish Assistants

Two members of the congregation have undertaken the Diocese of York's Recognised Parish Assistant course. These individuals are licensed and permitted to visit parishioners, administer the reserved sacrament to the sick and housebound, undertake hospital and bereavement visits, assist the celebrant at services in sheltered accommodation and care homes in the parish, administer the chalice at Holy Communion, and be part of the prayer and ministry team.

Sidespeople

Sidespeople are an office established under Canon E2 (Of sidesmen or assistants to the churchwardens), who are appointed by the parochial church council to "promote the cause of true religion in the Parish and to assist the churchwardens in the discharge of their duties in maintaining order and decency in the church and churchyard, especially during the time of divine service".

At St Luke's, specific duties include welcoming people when they come into church, and enabling services to take place in good order.

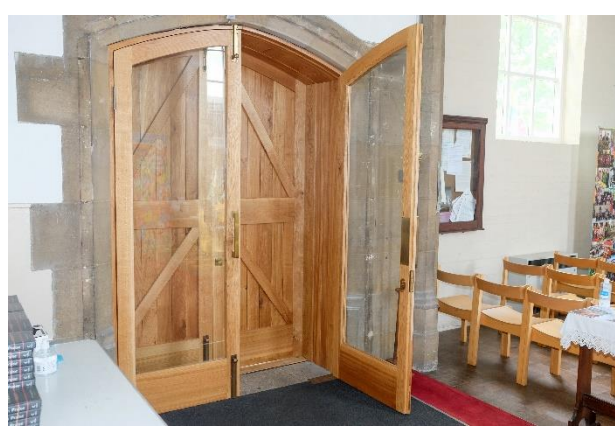
Other Volunteers

St Luke's does not employ any staff, and so all the church's activities are carried out on a voluntary basis. This includes children and youth workers, the PCC Secretary and Treasurer, a church hall secretary, pastoral support, prayer loop volunteers, eucharistic assistants, and all members of the groups mentioned in this report which contribute to and facilitate the life and work of the church.

BUILDINGS WORK

The work on Phase 1 of the St Luke's Community Hub Project was completed mid-May 2022. This included a new porch to the Lady Chapel with level access into the nave of the church; remodelling of the main entrance door on Burton Stone Lane with oak external doors and glazed internal doors; and the installation of new glazed screens within the chancel/sanctuary arches. These modest improvements have made a huge impact on the accessibility of our church building, the flexibility of its use including an opportunity for energy saving, and the improvement to the 'look' and attractiveness of our building viewed from Burton Stone Lane.

Funds still need to be raised to progress to phase two of the project, building a new community hall, and this has been impacted on by the pandemic and increased costs due to Brexit.



FINANCIAL REPORT

INDEPENDENT EXAMINER'S REPORT

Report to the trustees/members of THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF ST LUKE THE EVANGELIST YORK

On the accounts for the year ended 31 December 2022

Charity number 1185606

Set out on pages 20 – 28

Responsibilities and basis of report I report my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2022.

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

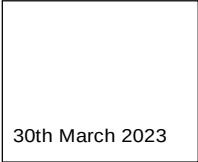
I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

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 and The Association of International 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.

Signed:  **Date:** 

Name:

Relevant professional qualification(s)

Address:

OVERVIEW

Once again, another challenging year. The aftermath of Covid and lockdowns, only to be hit more recently with a sharp increase in overheads with energy costs reaching an all-time high. Reserves in the General Fund now stand at £22,317 which is an improvement over recent years, in part due to Gift Aid being accrued to the end of 2022 and due for payment May or early June 2023.

INCOME

Planned giving, in the form of Bank Payments, Stewardship and the new Parish Giving Scheme have held up well, despite my gloomy forecast last year of a possible reduction of over £4,000. An increase in monthly giving from the established members of St Luke's and a growth in the congregation has ensured that the reduction was limited to around £200.

The Donations and Appeals for the Community Hub raised an amazing £26,500 with a further £2090 for Luke's Larder. There was also £1700 from smaller donations including those from the newly acquired Card Reader.

Financial support for Luke's Larder by regular Standing orders has reached £180 per month giving a total of £2,700 per annum including Gift Aid.

St Luke's Tide Gift Day saw donations of £5,840 which this year was allocated to the General Fund.

The Grants we received this year were £1,650 from the Ward Committee for Grapevine, £2,000 from York Diocese to help towards our Energy Costs and an Arts Grant of £500 to cover most of the Mystery Play expenses.

We received the final instalment of the John Brown's Estate amounting to £8,488 and a further £11,310 following the death of Marjorie Edgar.

Gift Aid received and accrued for 2022 including the Parish Giving Scheme amounted to £15,812 for the General Funds and £8,792 for the Restricted Funds.

Since the end of Covid restrictions we have seen an increased use of the Hall with lettings of £1,865, an increase of £1220 over the previous year.

The Christmas Fayre, Curry Night, The Last Cuckoo – a one-man play, and the Quiz Night generated just over £3000 for the Community Hub.

INVESTMENTS

Interest from our Investments with the Flagstone Group amounted to £1,611 plus accrued interest of £918.

EXPENDITURE

As always, the largest item of expenditure is the Freewill Offering which this year was £61,560, no increase from the previous year. The offering for 2023 has been reduced to £55,560 but will be reviewed by the PCC as and when finances allow.

Gas and electricity for the Church and Hall amounted to £6,435 an increase of £2,627 over the previous year.

Apart from the increase in Energy Costs there are few significant items of note. Upkeep of services and Church Maintenance are down. A sum of £400 was spent on a new Laptop for the Treasurer but this sum was donated by two members of the congregation with Gift Aid to help towards the cost of the Microsoft Licence for the first year.

The cost of the screens in Church and the new entrances was £103,000 and was covered by the Legacy Fund.

RESERVES

The Building Fund will be used as part payment for the new chairs, (£5,833) with the remainder going towards the Community Hub project.

The remainder of the Legacy Fund, after completion of the work being carried out in the Church, will also go towards the Community Hub.

RESERVES POLICY

The Diocesan benchmark for Reserves is four times the monthly unrestricted expenditure which would mean a level of around £26,000. Our current reserves fall short of this figure, but the PCC will always make it a priority to replenish whenever possible.

STATEMENT OF GOING CONCERN

The accounts were prepared on a going concern basis. The Trustees have concluded that the charity is a going concern.

The church can meet its operating costs and holds a suitable amount in total reserves. Whilst its benchmark for reserves is against the general reserves, the legacy reserves can be utilised to meet operational needs.

The church intends to use the legacy reserve for building works on the church and church hall. The church had experienced a decline in giving during the coronavirus pandemic, and a loss of income from the church hall lettings. The church is promoting the use of electronic giving to supplement lost loose plate collection income and other donations. The church can apply to the Diocese of York for financial support if necessary.

David Boyd, Treasurer

A large, handwritten signature in black ink, which appears to read 'David Boyd', with a long, sweeping flourish at the end.

RECEIPTS AND PAYMENTS ACCOUNT

	Unrestricted funds	Designated funds	Restricted funds	Endowment funds	Total funds	Prior year total funds
Receipts						
Voluntary Income						
Planned Giving	59,576	—	510	—	60,086	59,768
Collection at services	1,622	—	465	—	2,088	939
Donations	1,491	—	29,079	—	30,571	21,785
Gift Day	5,840	—	—	—	5,840	68
Grants	2,000	—	2,150	—	4,150	10,300
All other giving/voluntary income	881	19,798	—	—	20,679	185,252
Gift Aid recovered	18,066	—	8,792	—	26,858	29,385
Activities for Generating Funds	1,977	—	3,034	—	5,011	1,134
Investment income	2,210	1,778	3	—	3,992	126
Church Activities	1,365	—	328	—	1,693	1,049
Other incoming resources	—	—	—	—	—	—
Total receipts	95,032	21,576	44,364	—	160,972	309,810
Payments						
Church activities						
Free Will Offering	61,560	—	—	—	61,560	61,560
Clergy and Staffing	1,757	—	—	—	1,757	1,608
Church running expenses	11,851	—	4,094	—	15,945	12,546
Hall running costs	3,114	—	—	—	3,114	1,977
Church Major Repairs	—	103,171	—	—	103,171	19,359
Hall Major Repairs	—	—	—	—	—	—
Mission giving & donations	—	—	—	—	—	6,500
Cost of generating funds	1	—	4	—	5	—
Costs of generating voluntary income	24	—	—	—	24	—
Fundraising Trading costs	3	—	1,016	—	1,019	—
Investment management costs	—	469	—	—	469	281
New Building Work	—	—	—	—	—	3,253
Total payments	78,313	103,641	5,114	—	187,069	107,087
Excess of receipts over payments before transfer	16,719	(82,065)	39,249	—	(26,096)	202,723
Transfers						
Gross transfers between funds - in	—	—	7,091	—	7,091	20
Gross transfers between funds - out	—	—	(7,091)	—	(7,091)	(20)
Excess of receipts over payments before other gains / losses	16,719	(82,065)	39,249	—	(26,096)	202,723
Net movement in funds	16,719	(82,065)	39,249	—	(26,096)	202,723
All assets at 01 January 2022	7,208	323,013	78,800	—	409,021	206,298
All assets at 31 December 2022	23,927	240,948	118,049	—	382,925	409,021
Represented by						
Unrestricted						
General fund	23,927	—	—	—	23,927	7,208
Designated						
Building Fund	—	—	—	—	—	—
Legacy Fund	—	240,648	—	—	240,648	322,713
Mission	—	300	—	—	300	300
Restricted						
Building Fund	—	—	5,833	—	5,833	12,924
CAC Travel	—	—	—	—	—	—
Community Fund	—	—	280	—	280	280
Community Hub	—	—	106,913	—	106,913	62,128
Flower Fund	—	—	47	—	47	103
Green Group Fund	—	—	218	—	218	159
Luke's Larder	—	—	1,686	—	1,686	873

Magazine Fund	—	—	2,460	—	2,460	1,485
Mission	—	—	(24)	—	(24)	(24)
Mums & Toddlers	—	—	—	—	—	—
Music Fund	—	—	479	—	479	416
PRIDE	—	—	—	—	—	—
Sunnydene	—	—	—	—	—	—
Youth Fund	—	—	154	—	154	454

FUND MOVEMENT BY TYPE

	Opening	Incoming	Outgoing	Transfers	Gains/losses	Journals	Closing
PRIDE - PRIDE							
Restricted	—	253	253	—	—	—	—
Sub-total for PRIDE	—	253	253	—	—	—	—
MAGS - Magazine Fund							
Restricted	1,485	1,650	675	—	—	—	2,460
Sub-total for MAGS	1,485	1,650	675	—	—	—	2,460
COMMUNITY - Community Fund							
Restricted	280	—	—	—	—	—	280
Sub-total for COMMUNITY	280	—	—	—	—	—	280
Mission - Mission							
Designated	300	—	—	—	—	—	300
Restricted	(24)	—	—	—	—	—	(24)
Sub-total for Mission	275	—	—	—	—	—	275
Green - Green Group Fund							
Restricted	159	137	78	—	—	—	218
Sub-total for Green	159	137	78	—	—	—	218
CAC - CAC Travel							
Restricted	—	—	—	—	—	—	—
Sub-total for CAC	—	—	—	—	—	—	—
Lukeslard - Luke's Larder							
Restricted	873	3,472	2,658	—	—	—	1,686
Sub-total for Lukeslard	873	3,472	2,658	—	—	—	1,686
General - General fund							
Unrestricted	7,208	95,032	78,313	—	—	—	23,927
Sub-total for General	7,208	95,032	78,313	—	—	—	23,927
FLOWER - Flower Fund							
Restricted	103	(55)	—	—	—	—	47
Sub-total for FLOWER	103	(55)	—	—	—	—	47
YOUTH - Youth Fund							
Restricted	454	382	682	—	—	—	154
Sub-total for YOUTH	454	382	682	—	—	—	154
MUSIC - Music Fund							
Restricted	416	63	—	—	—	—	479
Sub-total for MUSIC	416	63	—	—	—	—	479
BUILDING - Building Fund							
Designated	—	—	—	—	—	—	—
Restricted	12,924	—	—	(7,091)	—	—	5,833
Sub-total for BUILDING	12,924	—	—	(7,091)	—	—	5,833
COMMHUB - Community Hub							
Restricted	62,128	37,948	254	7,091	—	—	106,913
Sub-total for COMMHUB	62,128	37,948	254	7,091	—	—	106,913

Legacy - Legacy Fund							
Designated	322,713	21,576	103,641	—	—	—	240,648
Sub-total for Legacy	322,713	21,576	103,641	—	—	—	240,648
SUNNY - Sunnydene							
Restricted	—	512	512	—	—	—	—
Sub-total for SUNNY	—	512	512	—	—	—	—
MUMS - Mums & Toddlers							
Restricted	—	—	—	—	—	—	—
Sub-total for MUMS	—	—	—	—	—	—	—
Grand total	409,021	160,972	187,069	—	—	—	382,925

STATEMENT OF ASSETS AND LIABILITIES

	General	Designated	Restricted	Endowment	This year	Last year
Current assets - Cash at bank and in hand						
Bank current account -	(8,427)	6,420	25,755	—	23,747	4,280
CCLA (CBF) deposit account -	21,580	63,494	1,263	—	86,338	85,516
Flagstone Investment Management -	1,610	170,115	—	—	171,726	220,489
Totals	14,763	240,029	27,018	—	281,812	310,287
Current assets - Debtors						
Accounts Receivable -	11,704	918	5,664	—	18,287	14,660
Totals	11,704	918	5,664	—	18,287	14,660
Current assets - Investments						
Methodist Chapel Aid Ltd -	—	—	85,000	—	85,000	85,000
Totals	—	—	85,000	—	85,000	85,000
Liabilities - Agency accounts						
Agency collections -	—	—	(366)	—	(366)	128
Totals	—	—	(366)	—	(366)	128
Liabilities - Creditors: Amounts falling due in one year						
Loans received -	100	—	—	—	100	—
Accounts Payable -	2,440	—	—	—	2,440	797
Totals	2,540	—	—	—	2,540	797
Grand total	23,927	240,948	118,049	—	382,925	409,021

ANALYSIS OF RECEIPTS AND PAYMENTS

					Total	
Unrestricted	Designated	Restricted	Endowment	This year	Last year	

INCOME AND ENDOWMENTS

Voluntary Income - Planned Giving

Gift Aid - Bank	47,464	—	510	—	47,974	56,361
Gift Aid - Parish Giving Scheme	9,027	—	—	—	9,027	940
Gift Aid - Envelopes	835	—	—	—	835	987
GAYE	—	—	—	—	—	—
Other planned giving	2,250	—	—	—	2,250	1,480
Total	59,576	—	510	—	60,086	59,768

Voluntary Income - Collection at services

Loose plate collections	1,622	—	465	—	2,088	939
Total	1,622	—	465	—	2,088	939

Voluntary Income - Donations

Donations Appeals etc. - Gift Aid	592	—	28,711	—	29,303	20,370
Donations, Appeals etc. - Other	815	—	167	—	982	1,415
Donations SumUp	84	—	201	—	285	—
Total	1,491	—	29,079	—	30,571	21,785

Voluntary Income - Gift Day

Regular Gift Days - Gift Aid	3,760	—	—	—	3,760	68
Regular Gift Days - Other	2,080	—	—	—	2,080	—
Total	5,840	—	—	—	5,840	68

Voluntary Income - Grants

Recurring grants	—	—	1,650	—	1,650	—
Non-recurring one-off grants	2,000	—	500	—	2,500	10,300
Total	2,000	—	2,150	—	4,150	10,300

Voluntary Income - All other giving/voluntary income

Giving through church boxes	—	—	—	—	—	1
Refreshments	881	—	—	—	881	251
Gifts of quoted securities	—	—	—	—	—	—
Legacies	—	19,798	—	—	19,798	185,000
Total	881	19,798	—	—	20,679	185,252

Voluntary Income - Gift Aid recovered

Tax recoverable on Gift Aid	15,812	—	8,792	—	24,604	29,150
Tax Recovered - Parish Giving Scheme	2,254	—	—	—	2,254	235
Total	18,066	—	8,792	—	26,858	29,385

Activities for Generating Funds

Other funds generated	—	—	—	—	—	—
Coffee Mornings, Concerts & other events	37	—	3,027	—	3,064	305
Sunnydene Income	—	—	—	—	—	—
Bookstall sales - fund raising	—	—	7	—	7	—
Church hall lettings - fund raising	1,865	—	—	—	1,865	745
Magazine income - advertising	—	—	—	—	—	—
Photocopy sales	75	—	—	—	75	84
Total	1,977	—	3,034	—	5,011	1,134

Investment income

Dividends	—	—	—	—	—	—
Bank and building society interest	2,210	1,778	3	—	3,992	126
Rent from lands or buildings	—	—	—	—	—	—
Total	2,210	1,778	3	—	3,992	126

Church Activities

Fees for weddings and funerals	1,315	—	—	—	1,315	1,011
Bookstall sales to promote objectives	—	—	—	—	—	5
Church hall lettings - objectives	—	—	—	—	—	—
Parish magazine sales	—	—	—	—	—	—
Children's Work	—	—	20	—	20	32
Pathfinder Weekend	50	—	308	—	358	—
Activity Week	—	—	—	—	—	—
Total	1,365	—	328	—	1,693	1,049

Other incoming resources

Insurance claims	—	—	—	—	—	—
Surplus - sales of fixed assets	—	—	—	—	—	—
Total	—	—	—	—	—	—
INCOME TOTAL	95,032	21,576	44,364	—	160,972	309,810

EXPENDITURE

Church activities - Free Will Offering

Stipends Quota	—	—	—	—	—	—
Free Will Offering	61,560	—	—	—	61,560	61,560
Total	61,560	—	—	—	61,560	61,560

Church activities - Clergy and Staffing

Assistant staff costs	—	—	—	—	—	—
Salary of Organist	1,700	—	—	—	1,700	1,550
Salary of PA to Incumbent	—	—	—	—	—	—
Salary of parish administrator	—	—	—	—	—	—
Salary of Community Worker	—	—	—	—	—	—
Working expenses of incumbent	—	—	—	—	—	34
Council tax	—	—	—	—	—	—
Vicarage Costs	—	—	—	—	—	—
Vicarage Water	—	—	—	—	—	(6)
Parsonage - water	—	—	—	—	—	—
Vicar's telephone	—	—	—	—	—	30
Visiting speakers	57	—	—	—	57	—
Total	1,757	—	—	—	1,757	1,608

Church activities - Church running expenses

Training	—	—	—	—	—	—
Parish training and mission	—	—	2,658	—	2,658	2,155
Children's Work	—	—	99	—	99	42
Activity Week	—	—	—	—	—	—
Pathfinder Weekend	—	—	582	—	582	—
Church running - insurance	2,226	—	—	—	2,226	2,137
Church office - telephone	268	—	—	—	268	318
Photocopier Service	477	—	—	—	477	411
Photocopier Lease	1,060	—	—	—	1,060	1,060
Organ / piano tuning	265	—	—	—	265	265
Church maintenance	945	—	—	—	945	1,295
Cleaning	—	—	—	—	—	25
Upkeep of services	655	—	—	—	655	1,129
Upkeep of churchyard	—	—	78	—	78	—
Administration	602	—	—	—	602	266
Refreshments	350	—	—	—	350	178
Church running - electric	960	—	—	—	960	681
Church running - gas	4,037	—	—	—	4,037	2,576
Church running - water	—	—	—	—	—	—
Church running - oil	—	—	—	—	—	—
Church running - heating and lighting	—	—	—	—	—	—
Magazine expenses	—	—	675	—	675	—
Governance costs examination/audit fee	—	—	—	—	—	—
PCC Meeting Costs	—	—	—	—	—	—
Total	11,851	—	4,094	—	15,945	12,546

Church activities - Hall running costs

Hall running - oil	—	—	—	—	—	—
Hall running - electricity	—	—	—	—	—	—
Hall running - gas	1,438	—	—	—	1,438	551

Hall running - insurance	1,162	—	—	—	1,162	1,115
Hall running - maintenance	233	—	—	—	233	16
Hall Running - Cleaner	—	—	—	—	—	—
Hall running - telephone	—	—	—	—	—	—
Hall running - water	150	—	—	—	150	164
Hall running - heating and lighting	130	—	—	—	130	130
Total	3,114	—	—	—	3,114	1,977

Church activities - Church Major Repairs

Church major repairs - structure	—	—	—	—	—	170
Church major repairs - installation	—	103,171	—	—	103,171	19,189
Church interior and exterior decorating	—	—	—	—	—	—
Total	—	103,171	—	—	103,171	19,359

Church activities - Hall Major Repairs

Hall + major repairs - structure	—	—	—	—	—	—
Hall + major repairs - installation	—	—	—	—	—	—
Hall + interior and exterior decorating	—	—	—	—	—	—
Other PCC property upkeep	—	—	—	—	—	—
Total	—	—	—	—	—	—

Church activities - Mission giving & donations

Giving to Missionary Societies	—	—	—	—	—	1,620
Giving - Relief and Development Agencies	—	—	—	—	—	—
Home Mission	—	—	—	—	—	3,660
Secular Charities	—	—	—	—	—	1,220
Total	—	—	—	—	—	6,500

Cost of generating funds

Bank Charges and Fees	1	—	4	—	5	—
Total	1	—	4	—	5	—

Cost of generating funds - Costs of generating voluntary income

Fees paid to fund raisers	—	—	—	—	—	—
Costs of applying for grants	—	—	—	—	—	—
Costs of stewardship campaign	24	—	—	—	24	—
Total	24	—	—	—	24	—

Cost of generating funds - Fundraising Trading costs

Costs of Coffee Mornings & other events	3	—	503	—	506	—
Sunnydene Payments	—	—	512	—	512	—
Bookstall costs	—	—	—	—	—	—
Total	3	—	1,016	—	1,019	—

Cost of generating funds - Investment management costs

Investment management costs	—	469	—	—	469	281
Total	—	469	—	—	469	281

New Building Work

New building parsonage house	—	—	—	—	—	—
New building house for curate	—	—	—	—	—	—
New building Church	—	—	—	—	—	—
New building Hall	—	—	—	—	—	3,253
Total	—	—	—	—	—	3,253

EXPENDITURE TOTAL	78,313	103,641	5,114	—	187,069	107,087
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GRAND TOTAL	16,719	(82,065)	39,249	—	(26,096)	202,723
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Financial Report approved by the Trustees on 28th May 2023

Signature:



Full Name: Mrs Colette Longbottom

Position: Acting PCC Chair

Date: 28.05.23

The Trustees declare that they have approved the Trustees' Report above.

Signature:



Full Name: Mrs Colette Longbottom

Position: Acting PCC Chair

Date: 28.05.23

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES



Trustees' Annual Report

for the period

1st January 2021 to 31st December 2021

Charity

**THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF
ST LUKE THE EVANGELIST YORK**

Charity Registration Number

1185606

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St Luke's, York – Trustees' Annual Report 2021

Charity Registration Number: 1185606



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ADMINISTRATIVE INFORMATION

CONTACT INFORMATION

Address St Luke the Evangelist Church
Burton Stone Lane
YORK YO30 6DG

Phone No. 07584 551915

Email treasurer@stlukesyork.org

Website <https://www.stlukesyork.org>

CHARITY TRUSTEES

The charity's Trustees are the ex officio, elected, and co-opted members of the Parochial Church Council. Trustees are elected annually at the Annual Parish Meeting (Wardens) and the Annual Parochial Church Meeting (PCC Members).

PCC members who have served from 1st January 2021 until the date this report was approved were:

Ex Officio

Incumbent (Chair) Rev Jacqueline Margaret Doyle-Brett (Chair) until February 2021

Readers Lynn Anne Comer

Wardens

Colette Anne Longbottom *Chair from April 2021*
David Titterington-Cook

Deanery Synod Representatives Daniel Grayson until November 2021
Sally Christine Maybridge
Christina Jane Pownall

Elected Members

Stephen Michael Adams
Alfreda Alderson
Mark Justin Comer
Elizabeth Anne Davies
Stewart Andrew Graham
Jennifer Gwynne from April 2021
Harriet Rachel Leigh
Anne Kathryn Lockett

Elizabeth Marjorie Sharp
Gillian Mary Tyler
Elizabeth Anne Village

Co-opted Members

Deacon Margaret Elizabeth Carrington

OTHER CHARITY OFFICERS (NON-TRUSTEES)

Treasurer David Boyd

GOVERNING DOCUMENT

The charity's principal governing document is the Parochial Church Council Powers Measure (1956) as amended *and* Church Representation Rules that came into force on 02 January 1956 and were revised in 2020.

CHARITABLE OBJECTIVES

The charity's stated objective is promoting in the Ecclesiastical Parish the whole mission of the Church.

BANKERS

The charity's funds are invested in three banks and investment groups as follows.

The Cooperative Bank	Flagstone Investment Management	CCLA Investment Management
PO Box 250	1 st Floor, Clareville House	Senator House
Delf House	26-27 Oxendon Street	85 Queen Victoria Street
Skelmersdale	London	London
WN8 6WT	SW1Y 4EL	EC4V 4ET

Methodist Chapel Aid
1 Telford Terrace
Albermarle Road
York
YO24 1DQ

INTRODUCTION

The Parochial Church Council presents their report and accounts for the year ended 31st December 2021. The financial statements comply with the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) (effective 1 January 2019).

The report covers the year 2021 between 01 January 2021 and 31 December 2021. However, the election of the PCC, who are the charity's trustees, took place at the church's Annual Parish and Annual Parochial Church Meetings (APCM) on 27 April 2021, due to covid restrictions at the time this was held virtually. The church's financial year covers the calendar year of 2021 as required for all Anglican churches in the Diocese of York. The accounts for 2021 are the latest full set of accounts for the period of this Trustees Report.

In February 2021 the vicar Rev Doyle-Brett resigned and moved to a new parish, leaving St Luke's with a vacancy. At this time the Diocese was launching the Living Christ's Story initiative. This included reviewing the deployment of stipendiary clergy across the diocese in order to improve the church's mission.

St Luke's continued to demonstrate that it is indeed a praying, caring, sharing church willing to live out its vision in the community it serves.

Work on the Community Hub project continued, although at a slower pace due to the pandemic and financial restraints.

Luke's Larder continued to grow and is a much-needed service in the community

St Luke's gradually reintroduced face to face services and groups safely. The PCC is committed to explore new ways to serve the church's parish and congregation as we continue to emerge from the pandemic.

STRUCTURE, GOVERNANCE, AND MANAGEMENT

St Luke's is an Ecclesiastical Parish Church in the Church of England, part of the Diocese of York. It is situated about a mile north of York Minster, standing on the corner of Burton Stone Lane and Shipton Street. The Parish extends eastwards from A19 Clifton with Burton Stone Lane as its spine. It is bounded by the York-to-Scarborough railway line to the east, and Kingsway North and Burton Green to the west and north.



THE PAROCHIAL CHURCH COUNCIL (THE TRUSTEES)

The Parochial Church Council (PCC) is a body corporate under the *Parochial Church Councils (Powers) Measure 1956* and the *Church Representation Rules* (revised in 2020). It is a charity registered with the Charities Commission (Registration Number 1185606).

Inter alia, the PCC is responsible for making decisions on all matters of general concern and importance to the Parish, including deciding how the funds of the PCC are to be spent.

The method of appointment and election of PCC members, including *ex officio* members, is set out in the *Church Representation Rules*. The membership of the PCC at St. Luke's is set out above on pages 4 and 5.

Elections for Churchwardens, PCC Members, and Deanery Synod Representatives takes place annually. In 2021, these elections took place at virtual Annual Parish and Annual Parochial Church Meetings (held under authority of a Bishop's Instrument issued for the Diocese of York allowing virtual APMs/APCMs to take place during the coronavirus pandemic) on 27 April 2021.

Elected members of the PCC serve a one- or three-year term and may stand for re-election at the end of their term. Deanery Synod representatives are elected for the duration of the Synod's triennium. Approximately one third of the elected membership of the PCC becomes vacant every year. Any person on the Electoral Roll of the Parish for more than six months preceding an election may stand to be a member of the PCC.

The PCC met four times during the year, with extra business conducted by correspondence on twelve occasions. The PCC continued to run virtual meetings due to the on-going pandemic and to protect the vulnerable members of the PCC and comply with government legislation. The group were able to meet once face to face for a full PCC and once face to face for one item of additional business.

Given the wide responsibility of the mission and ministry, and to encourage the growth of the church, several groups exist from time to time to be responsible for a particular aspect of Parish life. In 2021, these were: Christian Formation and Discipleship; Community Engagement; Finance and Buildings; Spiritual Enrichment and Nurture; and Welcome and Inclusion. The buildings project group continued in 2021 to look at specific plans for the church and church hall buildings. All groups report to the PCC.

From November 2020 no member of the PCC undertook the role of Treasurer, and so the PCC resolved to appoint a non-member to be the church's Treasurer until the next APCM.

RISK MANAGEMENT

The PCC is resolved to take appropriate steps to manage and mitigate risk through robust governance. These steps include regular monitoring of risk and identifying means to mitigate risks. This includes data protection compliance, financial monitoring including a reserves policy, a Parish continuity plan,

safeguarding policies, and health and safety policy and risk assessments. In 2021, the Parish continuity plan and health and safety risk assessments were revised to include the risks associated with the coronavirus pandemic, these continue to be reviewed and updated. Appropriate financial systems and procedures have been established to manage and identify financial risks. Budgetary and accounting risks are minimised by continual scrutiny of the accounts by the PCC at its regular meetings, and financial summaries are routinely circulated to the PCC between meetings.

PUBLIC BENEFIT

The Trustees confirm that they have complied with the duty of Section 4 of the Charities Act 2006 to have due regard to the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives, and in planning activities and setting policies and priorities for the year ahead.

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).

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 charity's 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.

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 1993 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 PCC

Gillian Tyler, PCC Secretary

ACTIVITIES, MISSION, AND OBJECTIVES

St Luke's PCC works together, in promoting the Ecclesiastical Parish, and the whole mission of the Church of England – pastoral, evangelistic, social, and ecumenical. In addition to its stated charitable objective of promoting the Ecclesiastical Parish, the PCC has resolved that

- **We believe in one God: Father, Son, and Holy Spirit;**
- **We are a Christian family of people who worship and serve God; and,**
- **We are a praying community, committed to caring for one another and those in our community, and sharing God's love with everyone.**

The Rev Jackie Doyle-Brett resigned her role and left on 7th February 2021, leaving a vacancy which remains unfilled. The activities, mission and objectives are continued by the PCC with the Church Wardens taking responsibility, supported by retired clergy from the Diocese.

The PCC is also specifically responsible for maintaining St Luke's Church Hall in Shipton Street, York, which is located adjacent to the church building.

WORSHIP AND PRAYER

The PCC is committed to enabling as many people as possible to become part of the worshipping community of the church, as well as working to care for the residents of the whole Ecclesiastical Parish. The PCC maintains an overview of the governance of the parish, as well as its worship and missional activities, and appoints individuals and creates groups to help facilitate its mission.

Services

St Luke's holds regular services of divine worship and occasional offices. These are offered during the week and throughout the year, which the community finds socially beneficial and spiritually uplifting. As an inclusive church, the PCC ensures that all services are provided in meaningful ways; the sacraments are rooted in Scripture that declares all God's children are loved. Together, the church community explores what this means for St Luke's and the wider Church.

Until the national lockdown restrictions resulting from the coronavirus pandemic came into force in March 2020, St Luke's held regular services of divine worship in the church building throughout the week. Additional services were also held from time to time to serve specific groups, or to respond to needs. The church's worship included:

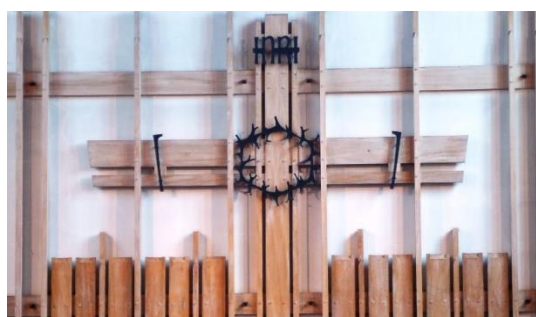
- **Sunday services**, in accordance with the Canons of the Church of England, with additional time for reflection during the service and a time for refreshments and socialisation afterwards;
- **Morning prayer**, on some week-day mornings;
- **Mid-week Eucharist**, on some Wednesday evenings;
- **Forget-Me-Not**, a simple service for those living with dementia and their carers, with a chance for refreshments and socialisation afterwards;
- **4everyone**, a monthly short, fun service for families with young children.

- **outsideIN**, a monthly Eucharist or service of prayer held on the first Saturday of every month, serving people who identify as LGBTQ+, their friends, and all who are committed to inclusion.

Both ordained and lay members of the congregation also provided spiritual direction, prayer, study groups, and other forms of worship on regular occasions.



After the imposition of lockdown restrictions in March 2020, the church building was closed. St Luke's began to offer pre-recorded services released on Sunday mornings, in place of the usual primary Sunday service and this continued in 2021. The church re-opened in Easter week 2021 on a 'booking for services' basis.



Once restrictions permitted the resumption of religious services, St. Luke's continued to be limited by health, safety, and social distancing guidelines. Eucharistic services and evening prayer resumed in the

church building, requiring pre-booking to attend. Holy Communion was administered in one kind only, and services were conducted according to COVID-safe guidelines and procedures issued by the government and the Diocese.

These continued into 2021 when face to face services were reinstated gradually in line with COVID restrictions.

Occasional Offices

In addition to regular and routine services, St Luke's enables the Parish and others to celebrate and give thanks to God at the milestones of a person's journey through life. This is conducted through baptism, in which we give thanks to God for the gift of a new child and commit them to the church community; the public declarations of love and the exchanging of the vows of marriage; and enabling at funerals the expression of families' grief in the loss of their loved ones, and the sure hope of the resurrection of the dead and the commendation of the dead into the hands of God.

During 2021 St Luke's was able to celebrate three baptisms, one wedding, and conduct six funeral services.



MISSION AND EVANGELISM

St Luke's is committed to the mission of the Church of England as expressed in the Five Marks of Mission:

- **Tell** – to proclaim the Good News of the Kingdom;
- **Teach** – to teach, baptise and nurture new believers;
- **Tend** – to respond to human need by loving service;
- **Transform** – to transform unjust structures of society, to challenge violence of every kind, and pursue peace and reconciliation; and,
- **Treasure** – to strive to safeguard the integrity of creation and sustain and renew the life of the earth.

St Luke's main aim in mission and evangelism is to enable everyone to live out their faith as part of our worshipping community through worship and prayer, the provision of pastoral care, outreach work, and promoting inclusion and affirmation.

Children and Youth Work

2021 was another challenging year for children's and youth work at St Luke's with the year starting with another lockdown and all children and youth work cancelled. As services resumed the Family Bubbles services restarted culminating in a family bubbles picnic in September.

The *4everyone* services started again in November with a change in format meeting in the church hall and allowing families to explore their faith through play, crafts, stories, songs, friends and fun.

Other groups that were gradually reinstated included teaching and activities during the Sunday morning service. Explorers and Pathfinders began to meet regularly and it is hoped to reinstate the Pathfinder weekend away in 2022.

Green and Environmental Work

In keeping with the Church of England's commitment to treasure and safeguard God's creation, the PCC operates and participates in green and environmental initiatives to sustain and renew the life of the earth.

The Church of England's National Environmental Working Group (EWG), in line with UK Government policy, is working towards the target of net zero carbon emissions by 2050, and those parts of the Church that can move faster are strongly encouraged to do so. The Church of England's interim target is a 57% reduction by 2030, compared with a baseline year in 2006.

In spite of COVID the group activities have continued in line with regulations. In June the group undertook litter picking as part of 'Keep Britain Tidy' and joined the National Butterfly Count.

In the run up to COP26 the group supported the Christian Aid project to send a fleet of origami prayer boats to the climate talks in Glasgow.

Communications

Communicating St Luke's faith, worship, aims, and activities is a year-round activity, and the church is grateful to those who keep it going. Individuals work hard to produce posters, flyers, leaflets, and more – as well as compiling, designing, arranging, printing, and distributing our widely-admired Grapevine magazine and monthly Grapevine Lite. In addition they maintain the website and St. Luke's Facebook page and the St. Luke's Facebook Community Group as well as having an email distribution list (following GDPR) to communicate with members of the congregation.

Community Engagement

Community outreach at St Luke's has been predominately around Luke's Larder. 2021 saw an increase in demand which continues to rise. In 2020 the larder fed on average 54 people per week in 2021, this increased to over 70.

During the summer holidays links with the local school increased and the group supported Rapid Relief boxes by shopping for and delivering a substantial quantity of cleaning goods and toiletries including sanitary items.

The group received some Ward funding and were able to provide 30 families with bags of groceries and recipes over October half term. The funding also enabled a freezer to be purchased to provide additional storage for Luke's Larder.

The group also works in partnership with the Methodist Church, who now run a mother and toddler group and provide some of our more needy families with clothes.

In September the 'Joyful Connections' café restarted with attendance gradually rising again.

The church trusts and prays that it will continue to be able to meet the needs of the community.

Spiritual Enrichment and Nurture

St Luke's recognises it is the responsibility of everyone to recognise and encourage all that God is about amongst us. Time should be set aside to pray regularly.

Prayer support by the prayer team continues, with individual requests coordinated and shared in confidence with the team. Other activities this year include prayer walks around the parish, joining other churches to pray for all churches, schools and community projects.

Changes to the way we live have continued through 2021. This impacts on the way we relate, worship, and work. Over 2021, the Spiritual Nurture and Engagement Team continued to reflect on the possibilities of what and how St Luke's offers "nurture and enrichment" within the congregation and the Parish throughout the emergence from lockdown.

St Luke's commitment to spiritual nurture and enrichment extends to all church groups, activities, events, and conversations.

Welcome and Inclusion

St Luke's is committed to the radical inclusion of all God's children in its worship and activities. St Luke's is registered with the Inclusive Church network.

The welcome team continue to be a key part of the warm and inclusive welcome that people receive at St Luke's. People are welcomed when they come into the building and this is followed up by offering to accompany them to the hall after the service and ensure they have an opportunity to chat to others. It is hoped to reinstate the welcome lunches in 2022.

The adaptations to the church building continued through 2021, improving access to all areas, this should be completed in 2022.

St Luke's outside services provide a new worshipping community for LGBT+ people, their families and friends and anyone who wants to belong to an inclusive and loving community. This group continues to grow with the on-line community doubling in 2021.

The church remains committed to sponsoring York Pride, alongside other Church of England churches, and those of different denominations (ecumenical churches) in York. It is hoped to participate in 2022.

In November 2021, the Church of England published the *Living in Love and Faith* teaching documents and programme, in line with its continuing discernment around human sexuality, relationships, and marriage. St Luke's is devising how best to engage with the teaching material in 2022, accounting for the Diocese of York's timeframe for engagement.

The PCC express their gratitude to the Worship and Inclusion Team for their hard work over a difficult year.

PASTORAL CARE

St Luke's provides pastoral care across the Ecclesiastical Parish in various ways. Everyone who regularly worships at St Luke's is well known to the PCC and Churchwardens, and their pastoral needs can be identified, and support offered.

At the start of the pandemic in March 2020, St Luke's created a continuity plan and this included pastoral care of the congregation and the community. Anyone needing support, whether that was a listening ear or practical support such as shopping, collecting medication etc were buddied up and support provided. This continued into 2021.

There are two Recognised Parish Assistants with specific responsibility for pastoral care and worship, and they provide a listening ear and outreach to the community, as well as the provision of prayer and the sacraments.

WORK WITHIN THE CHURCH OF ENGLAND

The three Deanery Synod Representative members of the PCC sit on the Deanery Synod for York Deanery. The Deanery Synod considers growth, mission, evangelism, and other matters which concern churches in the city centre and local area. This provides the PCC with an important link between St Luke's and the wider work of local churches.

The Deanery Synod met three times during the year, twice virtually and once face to face. The consultation on 'Living Christ's Story' continues. The next steps are to focus on a plan to aim for growth in health of communities and numbers and improve financial sustainability. The Dioceses are also looking at environmental issues and it was identified St Luke's were leading in making many of the changes.

ECUMENICAL RELATIONS

St Luke's works with churches of other Christian denominations for certain projects throughout the year. Ordinarily, this would include work with local Methodist, United Reformed Church, and groups within the Roman Catholic Church in support of York Pride. Due to the coronavirus pandemic, York Pride was not held in 2021. The PCC remains committed to working alongside other Christians, and other religious groups, to promote inclusion and affirmation.

VOLUNTEERS AND LAY WORKERS

The PCC is grateful that it has been supported by numerous volunteers over the year, who together make the church a praying, caring, and sharing presence in the Ecclesiastical Parish and beyond. The PCC recognises that without the work of the church's volunteers, it could not operate such a welcoming and inclusive church.

Recognised Parish Assistants

Two members of the congregation have undertaken the Diocese of York's Recognised Parish Assistant course. These individuals are licensed and permitted to visit parishioners, administer the reserved sacrament to the sick and housebound, undertake hospital and bereavement visits, assist the celebrant at services in sheltered accommodation and care homes in the parish, administer the chalice at Holy Communion, and be part of the prayer and ministry team.

Sidespeople

Sidespeople are an office established under Canon E2 (Of sidesmen or assistants to the churchwardens), who are appointed by the parochial church council to "promote the cause of true religion in the Parish and to assist the churchwardens in the discharge of their duties in maintaining order and decency in the church and churchyard, especially during the time of divine service".

At St Luke's, specific duties include welcoming people when they come into church, and enabling services to take place in good order. They are responsible for ensuring the information displays are up to date, taking the offering, and guiding congregants during the Eucharist.

As St Luke's has committed to being a radically inclusive church, the role of sidesperson is extended to include *Welcomers*. Their specific responsibility is to ensure people feel fully welcomed at services, and are identifiable to the congregation. As part of their welcome, Welcomers ensure that new visitors are looked after following services, including by introducing them to other members of the congregation, and ministers. The Welcomers are responsible for providing information about the church, its services, and its wider mission.

In 2021, there were 18 sidespeople and 12 were welcomers, but due to social distancing only the welcomers were used and they fulfilled both roles.

Other Volunteers

St Luke's does not employ any staff, and so all the church's activities are carried out on a voluntary basis. This includes a church hall secretary, pastoral support, prayer loop volunteers, eucharistic assistants, and all members of the groups mentioned in this report which contribute to and facilitate the life and work of the church.

BUILDINGS WORK

The St Luke's Community Hub Project has achieved some significant milestones during the year. The onerous environmental and sustainability conditions for the planning consent have been removed. The remaining legacy funding has been received and work is starting on Phase one of the project.

The stained-glass windows were installed in the Children's chapel, but dedication of the windows was delayed due to the pandemic.



In early December 2021 construction in church commenced. This consisted of building a new porch entrance to the Lady Chapel, and modification of the North West entrance (main doors) improving accessibility. Glazing to the chancel arches provides (ing) separate meeting or worship areas which can be independently heated. It is hoped this work will conclude in early 2022.

Funds still need to be raised to progress to phase two of the project, building a new community hall, and this has been impacted on by the pandemic and increased costs due to Brexit.

FINANCIAL REPORT

INDEPENDENT EXAMINER'S REPORT

Report to the trustees/members of THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF ST LUKE THE EVANGELIST YORK

On the accounts for the year ended 31 December 2021

Charity number 1185606

Set out on pages 23 – 31

Responsibilities and basis of report I report my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2021.

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.

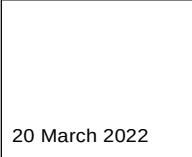
Independent Examiner's Statement The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of The Chartered Institute of Management Accountants and The Association of International Accountants.

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.

Signed:  **Date:** 

Name:

Relevant professional qualification(s)

Address:

OVERVIEW

Another unprecedented year in 2020, with almost everyone affected financially by the pandemic, and St Luke's was no exception. The Accounts show total reserves of £409,017 which includes the Designated Fund (Legacy) of £322,713; Hall and Building Fund of £75,052; and the General Fund of £7,204 – a increase of £4,548 against 2020 unrestricted funds. The General Fund now falls short of the benchmark of £27,000 due, in the main, to a reduction in income and additional unexpected costs on building work and church maintenance.

INCOME

Total receipts for ordinary unrestricted funds were £86,578 which is an increase of almost £5,500 against 2020. The increase is, however, partly due to an accrual of Gift Aid amounting to £9,159* which had not been included in previous years accounts. Regular giving saw a reduction of £212 per month due to change of circumstances (e.g., members of the congregation leaving St Luke's) but this was offset by an increase of £469 per month from our Giving in Grace appeal. Sadly, a further reduction of £535 per month has been recorded at the start of 2022 resulting in a net loss of £278 per month overall.

Income from Activities for Generating Funds was £1134 boosted by donations from the three organ recitals totaling £300, the remainder coming from Hall lettings which over the last couple of years have been greatly reduced due to the pandemic.

Tax reclaimed under the Gift Aid scheme remains a significant contribution to our income which was £15,130, slightly down from the previous year. (This does not take into account the accrual mentioned above).

Income for the Community Hub Project is £31,315 comprising of individual donations and Grants of £10,000 from All Churches Trust and £300 from Masonic Lodges.

INVESTMENTS

To safeguard the church's finances following the receipt of the legacy, the PCC authorised the transference of up to £85,000 in separate ethical financial institutions in 2020 so that, should there be any failures in the banking sector due to the pandemic, the funds would be covered by the Financial Services Compensation Scheme. This has resulted in slightly less favourable interest rates, but it was felt that this was a price worth paying to dutifully safeguard the church's funds. This fund continues to be monitored and managed.

EXPENDITURE

The largest significant item of normal expenditure remains the Free Will Offering to York Diocese of £61,560 which helps to support the work of the Diocese of York.

Clergy and staffing costs are down on last year as we are now in vacancy and no longer have any expenses relating to the Incumbent or the Vicarage.

Church running expenses are also down due to lower Church Maintenance and Upkeep of Services costs.

Church Major repairs of £19,359 was the initial payment for the work on the Lady Chapel and front entrance and came out of the Legacy Fund.

New Building Work of £3,253 related to some preparatory work for the Community Hub Project.

RESERVES

The Building Fund will be used as part payment for the new chairs, (£5,833) with the remainder going towards the Community Hub project.

The remainder of the Legacy Fund, after completion of the work being carried out in the Church, will also go towards the Community Hub.

The General fund is used for the day to day running of the Church which shows a surplus of £7,204 (see above *)

RESERVES POLICY

The Diocesan benchmark for Reserves is four times the monthly unrestricted expenditure which would mean a level of around £27,000. Our current reserves fall far short of this figure but the PCC will always make it a priority to replenish whenever possible.

STATEMENT OF GOING CONCERN

The accounts were prepared on a going concern basis. The Trustees have concluded that the charity is a going concern.

The church can meet its operating costs and holds a suitable amount in total reserves. Whilst its benchmark for reserves is against the general reserves, the legacy reserves can be utilised to meet operational needs. The church had a series of generous giving initiatives to run in September and October 2021, in line with the Diocese of York's generous giving scheme. As the church has reopened for services due to changes in national restrictions, loose plate collection income has resumed.

The church intends to use the legacy reserve for building works on the church and church hall. The church has experienced a decline in giving during the coronavirus pandemic, and a loss of income from the church hall lettings. The church intends to promote the use of electronic giving to supplement lost

loose plate collection income and other donations. The church can apply to the Diocese of York for financial support if necessary.

David Boyd, Treasurer

A handwritten signature in black ink, appearing to read 'David Boyd', with a stylized flourish at the end.

STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted Funds	Restricted Funds	Endowment Funds	Total Funds	Prior Year Total Funds
Receipts					
Voluntary Income	59,284	480	—	59,764	60,120
Planned Giving	939	—	—	939	685
Collection at services	770	21,015	—	21,785	2,767
Donations	68	—	—	68	25,575
Gift Day	—	10,300	—	10,300	328
Grants	185,252	—	—	185,252	156
All other giving/voluntary income	23,076	6,308	—	29,385	16,561
Gift Aid recovered	1,134	—	—	1,134	1,077
Activities for Generating Funds	126	0	—	126	666
Investment income	1,016	32	—	1,049	1,099
Church Activities	—	—	—	—	—
Other incoming resources	271,669	38,136	—	309,806	109,037
Payments					
Church activities	61,560	—	—	61,560	61,560
Free Will Offering	1,608	—	—	1,608	3,557
Clergy and Staffing	10,363	2,183	—	12,546	14,999
Church running expenses	1,977	—	—	1,977	2,013
Hall running costs	19,359	—	—	19,359	39,948
Church Major Repairs	—	—	—	—	2,325
Hall Major Repairs	6,500	—	—	6,500	19,060
Mission giving & donations	—	—	—	—	58
Cost of generating funds	—	—	—	—	317
Costs of generating voluntary income	—	—	—	—	—
Fundraising Trading costs	—	—	—	—	—

	281	—	—	281	90
Investment management costs					
New Building Work	3,253	—	—	3,253	11,931
Total expenditure	104,904	2,183	—	107,087	155,861
Net income / (expenditure) resources before transfer	166,765	35,953	—	202,719	(46,824)
Transfers					
Gross transfers between funds - in	20	0	—	20	10,000
Gross transfers between funds - out	(20)	—	—	(20)	(10,000)
Other recognised gains / losses					
Gains / losses on investment assets	—	—	—	—	—
Gains on revaluation, fixed assets, charity's own use	—	—	—	—	—
Net movement in funds	166,765	35,953	—	202,719	(46,824)
Total funds brought forward	163,452	42,846	—	206,298	253,123
Total funds carried forward	330,217	78,800	—	409,017	206,298
Represented by					
Unrestricted					
General fund	7,204	—	—	7,204	2,656
Designated					
Building Fund	—	—	—	—	—
Legacy Fund	322,713	—	—	322,713	160,495
Mission	300	—	—	300	300
Restricted					
Building Fund	—	12,924	—	12,924	12,924
CAC Travel	—	—	—	—	285
Community Fund	—	280	—	280	280
Flower Fund	—	103	—	103	47
Green Group Fund	—	159	—	159	159
Hall Building	—	62,128	—	62,128	26,204
Luke's Larder	—	873	—	873	604
Magazine Fund	—	1,485	—	1,485	1,485
Mission	—	(24)	—	(24)	(24)
Mums & Toddlers	—	—	—	—	—
Music Fund	—	416	—	416	415
Sunnydene	—	—	—	—	—
Youth Fund	—	454	—	454	465

BALANCE SHEET

Funds	Total funds	Prior year
Current assets		
Debtors	14,660	28
Investments	85,000	—
Cash at bank and in hand	310,283	206,718
	409,943	206,747
Liabilities		
Creditors: Amounts falling due in one year	925	448
	925	448
Net current assets less current liabilities	409,017	206,298
Total assets less current liabilities	409,017	206,298
Total net assets less liabilities	409,017	206,298
Represented by		
Unrestricted		
General fund	7,204	2,656
Designated		
Mission	300	300
Building Fund	—	—
Legacy Fund	322,713	160,495
Restricted		
Magazine Fund	1,485	1,485
Building Fund	12,924	12,924
Hall Building	62,128	26,204
Sunnydene	—	—
Mums & Toddlers	—	—
Community Fund	280	280
Mission	(24)	(24)
Green Group Fund	159	159
CAC Travel	—	285
Luke's Larder	873	604
Flower Fund	103	47
Youth Fund	454	465
Music Fund	416	415
Funds of the church	409,017	206,298

STATEMENT OF ASSETS AND LIABILITIES

	General	Designated	Restricted	Endowmen t	This Year	Last Year
Current assets - Cash at bank and in hand						
Bank current account -	(22,733)	39,614	(12,604)	—	4,276	35,874
CCLA (CBF) deposit account -	21,348	62,908	1,259	—	85,516	85,472
Flagstone Investment Management -	—	220,489	—	—	220,489	85,371
Totals	(1,384)	323,013	(11,345)	—	310,283	206,718
Current assets - Debtors						
Accounts Receivable -	9,386	—	5,273	—	14,660	28
Totals	9,386	—	5,273	—	14,660	28
Current assets - Investments						
Methodist Chapel Aid Ltd -	—	—	85,000	—	85,000	—
Totals	—	—	85,000	—	85,000	—
Liabilities - Agency accounts						
Agency collections -	—	—	128	—	128	(188)
Totals	—	—	128	—	128	(188)
Liabilities - Creditors: Amounts falling due in one year						
Accounts Payable -	797	—	—	—	797	637
Totals	797	—	—	—	797	637
Grand total	7,204	323,013	78,800	—	409,017	206,298

ANALYSIS OF INCOME AND EXPENDITURE

INCOME AND ENDOWMENTS

	Unrestricte d	Designated	Restricted	Endowment	This Year	Last Year
Voluntary Income - Planned Giving						
0101 - Gift Aid - Bank	55,877	—	480	—	56,357	56,336
0102 - Gift Aid - Parish Giving Scheme	940	—	—	—	940	—
0110 - Gift Aid - Envelopes	987	—	—	—	987	2,344
0111 - GAYE	—	—	—	—	—	—
0201 - Other planned giving	1,480	—	—	—	1,480	1,440
Total	59,284	—	480	—	59,764	60,120
Voluntary Income - Collection at services						
0301 - Loose plate collections	939	—	—	—	939	685
Total	939	—	—	—	939	685

Voluntary Income - Donations

0501 - Donations Appeals etc. - Gift Aid	343	—	20,027	—	20,370	1,136
0502 - Donations, Appeals etc. - Other	427	—	988	—	1,415	1,631
Total	770	—	21,015	—	21,785	2,767

Voluntary Income - Gift Day

0401 - Regular Gift Days - Gift Aid	68	—	—	—	68	5,425
0402 - Regular Gift Days - Other	—	—	—	—	—	20,150
Total	68	—	—	—	68	25,575

Voluntary Income - Grants

0801 - Recurring grants	—	—	—	—	—	328
08A1 - Non-recurring one-off grants	—	—	10,300	—	10,300	—
Total	—	—	10,300	—	10,300	328

Voluntary Income - All other giving/voluntary income

0410 - Giving through church boxes	1	—	—	—	1	—
0415 - Refreshments	251	—	—	—	251	156
0510 - Gifts of quoted securities	—	—	—	—	—	—
0701 - Legacies	—	185,000	—	—	185,000	—
Total	252	185,000	—	—	185,252	156

Voluntary Income - Gift Aid recovered

0601 - Tax recoverable on Gift Aid	22,841	—	6,308	—	29,150	16,561
0602 - Tax Recovered - Parish Giving Scheme	235	—	—	—	235	—
Total	23,076	—	6,308	—	29,385	16,561

Activities for Generating Funds

0901 - Other funds generated	—	—	—	—	—	—
0910 - Coffee Mornings, Concerts & other events	305	—	—	—	305	37
0920 - Sunnysdene Income	—	—	—	—	—	—
1220 - Bookstall sales - fund raising	—	—	—	—	—	—
1240 - Church hall lettings - fund raising	745	—	—	—	745	1,019
1250 - Magazine income - advertising	—	—	—	—	—	—
1265 - Photocopy sales	84	—	—	—	84	20
Total	1,134	—	—	—	1,134	1,077

Investment income

1001 - Dividends	—	—	—	—	—	—
------------------	---	---	---	---	---	---

1020 - Bank and building society interest	34	91	0	—	126	666
1030 - Rent from lands or buildings	—	—	—	—	—	—
Total	34	91	0	—	126	666

Church Activities

1101 - Fees for weddings and funerals	1,011	—	—	—	1,011	955
1210 - Bookstall sales to promote objectives	5	—	—	—	5	100
1230 - Church hall lettings - objectives	—	—	—	—	—	—
1260 - Parish magazine sales	—	—	—	—	—	—
1270 - Children's Work	—	—	32	—	32	44
1271 - Pathfinder Weekend	—	—	—	—	—	—
1272 - Activity Week	—	—	—	—	—	—
Total	1,016	—	32	—	1,049	1,099

Other incoming resources

1310 - Insurance claims	—	—	—	—	—	—
1320 - Surplus - sales of fixed assets	—	—	—	—	—	—
Total	—	—	—	—	—	—
INCOME TOTAL	86,578	185,091	38,136	—	309,806	109,037

EXPENDITURE

	Unrestricted	Designated	Restricted	Endowment	This Year	Last Year
Church activities - Free Will Offering						
1901 - Stipends Quota	—	—	—	—	—	—
1910 - Free Will Offering	61,560	—	—	—	61,560	61,560
Total	61,560	—	—	—	61,560	61,560
Church activities - Clergy and Staffing						
2001 - Assistant staff costs	—	—	—	—	—	11
2010 - Salary of Organist	1,550	—	—	—	1,550	1,810
2040 - Salary of PA to Incumbent	—	—	—	—	—	—
2050 - Salary of parish administrator	—	—	—	—	—	—
2060 - Salary of Community Worker	—	—	—	—	—	493
2101 - Working expenses of incumbent	34	—	—	—	34	398
2120 - Council tax	—	—	—	—	—	—
2130 - Vicarage Costs	—	—	—	—	—	—
2140 - Vicarage Water	(6)	—	—	—	(6)	440
2145 - Parsonage - water	—	—	—	—	—	—
2150 - Vicar's telephone	30	—	—	—	30	402
2180 - Visiting speakers	—	—	—	—	—	—
Total	1,608	—	—	—	1,608	3,557

Church activities - Church running expenses

2170 - Training	—	—	—	—	—	—
2201 - Parish training and mission	237	—	1,918	—	2,155	200
2202 - Children's Work	—	—	42	—	42	185
2203 - Activity Week	—	—	—	—	—	—
2204 - Pathfinder Weekend	—	—	—	—	—	—
2301 - Church running - insurance	2,137	—	—	—	2,137	2,128
2310 - Church office - telephone	318	—	—	—	318	626
2314 - Photocopier Service	411	—	—	—	411	412
2315 - Photocopier Lease	1,060	—	—	—	1,060	1,195
2320 - Organ / piano tuning	265	—	—	—	265	265
2330 - Church maintenance	1,295	—	—	—	1,295	4,625
2331 - Cleaning	25	—	—	—	25	—
2340 - Upkeep of services	907	—	222	—	1,129	1,141
2350 - Upkeep of churchyard	—	—	—	—	—	—
2360 - Administration	266	—	—	—	266	241
2375 - Refreshments	178	—	—	—	178	97
2401 - Church running - electric	681	—	—	—	681	616
2410 - Church running - gas	2,576	—	—	—	2,576	2,197
2420 - Church running - water	—	—	—	—	—	—
2430 - Church running - oil	—	—	—	—	—	—
2440 - Church running - heating and lighting	—	—	—	—	—	—
2501 - Magazine expenses	—	—	—	—	—	1,065
2601 - Governance costs examination/audit fee	—	—	—	—	—	—
2602 - PCC Meeting Costs	—	—	—	—	—	—
Total	10,363	—	2,183	—	12,546	14,999

Church activities - Hall running costs

2520 - Hall running - oil	—	—	—	—	—	—
2530 - Hall running - electricity	—	—	—	—	—	—
2540 - Hall running - gas	551	—	—	—	551	586
2550 - Hall running - insurance	1,115	—	—	—	1,115	1,110
2560 - Hall running - maintenance	16	—	—	—	16	77
2565 - Hall Running - Cleaner	—	—	—	—	—	—
2570 - Hall running - telephone	—	—	—	—	—	—
2580 - Hall running - water	164	—	—	—	164	239
2590 - Hall running - heating and lighting	130	—	—	—	130	—
Total	1,977	—	—	—	1,977	2,013

Church activities - Church Major Repairs

2701 - Church major repairs - structure	—	170	—	—	170	18,071
2710 - Church major repairs - installation	—	19,189	—	—	19,189	19,800
2720 - Church interior and exterior decorating	—	—	—	—	—	2,077
Total	—	19,359	—	—	19,359	39,948

Church activities - Hall Major Repairs

2801 - Hall + major repairs - structure	—	—	—	—	—	2,000
2820 - Hall + major repairs - installation	—	—	—	—	—	—
2830 - Hall + interior and exterior decorating	—	—	—	—	—	—
2840 - Other PCC property upkeep	—	—	—	—	—	325
Total	—	—	—	—	—	2,325

Church activities - Mission giving & donations

1801 - Giving to Missionary Societies	1,620	—	—	—	1,620	1,810
1830 - Giving - Relief and Development Agencies	—	—	—	—	—	1,810
1850 - Home Mission	3,660	—	—	—	3,660	12,720
1870 - Secular Charities	1,220	—	—	—	1,220	2,720
Total	6,500	—	—	—	6,500	19,060

Cost of generating funds - Costs of generating voluntary income

1701 - Fees paid to fund raisers	—	—	—	—	—	—
1710 - Costs of applying for grants	—	—	—	—	—	—
1720 - Costs of stewardship campaign	—	—	—	—	—	58
Total	—	—	—	—	—	58

Cost of generating funds - Fundraising Trading costs

1730 - Costs of Coffee Mornings & other events	—	—	—	—	—	317
1750 - Sunnyside Payments	—	—	—	—	—	—
2510 - Bookstall costs	—	—	—	—	—	—
Total	—	—	—	—	—	317

Cost of generating funds - Investment management costs

1740 - Investment management costs	—	281	—	—	281	90
Total	—	281	—	—	281	90

New Building Work

2901 - New building parsonage house	—	—	—	—	—	—
2910 - New building house for curate	—	—	—	—	—	—
2920 - New building Church	—	—	—	—	—	—
2930 - New building Hall	—	3,253	—	—	3,253	11,931
Total	—	3,253	—	—	3,253	11,931
EXPENDITURE TOTAL	82,010	22,894	2,183	—	107,087	155,861

GRAND TOTAL	4,568	162,197	35,953	—	202,719	(46,824)
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Financial Report approved by the Trustees on 03.04.2022

Signature:



Full Name:

Mrs Colette Longbottom

Position:

PCC Chair

Date:

27 04 2022

DECLARATIONS

The Trustees declare that they have approved the Trustees' Report above.

Signature:



Full Name:

Mrs Colette Longbottom

Position:

PCC Chair

Date:

14 06 2022

Accounts



Trustees' Annual Report

for the period

1st January 2020 to 31st December 2020

Charity

**THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF
ST LUKE THE EVANGELIST YORK**

Charity Registration Number

1185606

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ADMINISTRATIVE INFORMATION

CONTACT INFORMATION

Address St Luke the Evangelist Church
Burton Stone Lane
YORK YO30 6DG

Phone No. 01904 628 337

Email treasurer@stlukesyork.org

Website <https://www.stlukesyork.org>

CHARITY TRUSTEES

The charity's Trustees are the ex officio, elected, and co-opted members of the Parochial Church Council. Trustees are elected annually at the Annual Parish Meeting (Wardens) and the Annual Parochial Church Meeting (PCC Members).

PCC members who have served from 1st January 2020 until the date this report was approved were:

Ex Officio

Incumbent (Chair) Rev Jacqueline Margaret Doyle-Brett (Chair) until February 2021

Readers Lynn Anne Comer
Martin Sheppard until September 2020

Wardens Elaine Hill until November 2020
Colette Anne Longbottom from November 2020
Chair from April 2021
David Pownall until November 2020
David Titterington-Cook from November 2020

Deanery Synod Representatives Daniel Grayson from November 2020
James Hume until April 2020
Sally Christine Maybridge
Christina Jane Pownall

Elected Members

Stephen Michael Adams
Alfreda Alderson
George Buynan until November 2020
Mark Justin Comer from November 2020

Sarah Daniel	until November 2020
Elizabeth Anne Davies	
Steward Andrew Graham	from November 2020
Jennifer Gwynne	from April 2021
Harriet Rachel Leigh	from November 2020
Anne Kathryn Lockitt	
Barbara Martin	until November 2020
Elizabeth Marjorie Sharp	
Gillian Mary Tyler	
Elizabeth Anne Village	from November 2020
Geoffrey Williams	until November 2020

Co-opted Members

Deacon Margaret Elizabeth Carrington

OTHER CHARITY OFFICERS (NON-TRUSTEES)

Treasurer David Boyd

GOVERNING DOCUMENT

The charity's principal governing document is the Parochial Church Council Powers Measure (1956) as amended *and* Church Representation Rules that came into force on 02 January 1956 and were revised in 2020.

CHARITABLE OBJECTIVES

The charity's stated objective is promoting in the Ecclesiastical Parish the whole mission of the Church.

BANKERS

The charity's funds are invested in three banks and investment groups as follows.

The Cooperative Bank	Flagstone Investment Management	CCLA Investment Management
PO Box 250	1 st Floor, Clareville House	Senator House
Delf House	26-27 Oxendon Street	85 Queen Victoria Street
Skelmersdale	London	London
WN8 6WT	SW1Y 4EL	EC4V 4ET

INTRODUCTION

The Parochial Church Council presents their report and accounts for the year ended 31st December 2020. The financial statements comply with the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and the Republic of Ireland (FRS 102) (effective 1 January 2019).

This report is the first report of the Trustees of the Parochial Church Council of the Ecclesiastical Parish of St Luke the Evangelist, York. The PCC became a registered charity on 3rd October 2019 because the church's income had been in excess of the £100,000 threshold for two consecutive years and is now in receipt of a large legacy.

The report covers the year 2020 between 01 January 2020 and 31 December 2020. However, the election of the PCC, who are the charity's trustees, took place at the church's Annual Parish and Annual Parochial Church Meetings (APCM) on 07 November 2020. The church's financial year covers the calendar year of 2020 as required for all Anglican churches in the Diocese of York. The accounts for 2020 are the latest full set of accounts for the period of this Trustees Report.

In February 2020, the Vicar's Report talked of a time of excitement in the year ahead. However, by 23 March 2020 the nation had entered the first lockdown. The church building closed, and everything seemed to be put on hold. The pandemic gave St Luke's the opportunity to demonstrate that is indeed a praying, caring, sharing church willing to live out its vision in the community it serves. Within weeks of the lockdown, St Luke's had responded by setting up *Helping Hands*, *Prayer Connect*, pastoral link coordinators, online worship, and a worship landline. The leadership group created a Parish Continuity Plan and the associated risk assessments. The whole church came together to serve its community.

Even though many projects and activities had to cease, certain other projects continued. Work on the Community Hub project continued, with the Buildings Group drawing up plans and submitting Faculty applications. Services of divine worship continued, and, thanks to the outsideIN and Church Differently services, the church has continued to grow in the 20-40 age range, despite lockdowns and restrictions.

St Luke's was also able to take a decision to support Church Mission Society partners and able to meet the partners in December. It was a privilege to be able to listen to them during one of the church's services and hear of their mission and ministry in Brazil. *Luke's Larder* also continued to develop, and moved from term-time only to weekly, and now includes the *Can Cook* initiative. This has become a vital community resource as the pandemic progressed.

St Luke's looks forward to being able to safely resume some pre-pandemic activities in 2021, and the PCC is committed to explore new ways to serve the church's Parish and congregation as we emerge from the pandemic.



STRUCTURE, GOVERNANCE, AND MANAGEMENT

St Luke's is an Ecclesiastical Parish Church in the Church of England, part of the Diocese of York. It is situated about a mile north of York Minster, standing on the corner of Burton Stone Lane and Shipton Street. The Parish extends eastwards from A19 Shipton Road with Burton Stone Lane as its spine. It is bounded by the York-to-Scarborough railway line to the east, and Kingsway North and Burton Green to the west and north.



THE PAROCHIAL CHURCH COUNCIL (THE TRUSTEES)

The Parochial Church Council (PCC) is a body corporate under the *Parochial Church Councils (Powers) Measure 1956* and the *Church Representation Rules* (revised in 2020). It is a charity registered with the Charities Commission (Registration Number 1185606).

Inter alia, the PCC is responsible for making decisions on all matters of general concern and importance to the Parish, including deciding how the funds of the PCC are to be spent.

The method of appointment and election of PCC members, including *ex officio* members, is set out in the *Church Representation Rules*. The membership of the PCC at St. Luke's is set out above on pages **Error! Bookmark not defined.-5**.

Elections for Churchwardens, PCC Members, and Deanery Synod Representatives takes place annually. In 2020, these elections took place at virtual Annual Parish and Annual Parochial Church Meetings (held under authority of a Bishop's Instrument issued for the Diocese of York allowing virtual APMs/APCMs to take place during the coronavirus pandemic) on 07 November 2020.

Elected members of the PCC serve a one- or three-year term and may stand for re-election at the end of their term. Deanery Synod representatives are elected for the duration of the Synod's triennium. Approximately one third of the elected membership of the PCC becomes vacant every year. Any person on the Electoral Roll of the Parish for more than six months preceding an election may stand to be a member of the PCC.

The PCC met four times during the year, with extra business conducted by correspondence on six occasions. The average attendance at PCC meetings was 79%. Attendance was affected due to the need during the coronavirus pandemic of meeting via videoconferencing technology, and some members were unable to participate in virtual meetings.

Given the wide responsibility of the mission and ministry, and to encourage the growth of the church, several groups exist from time to time to be responsible for a particular aspect of Parish life. In 2020, these were: Christian Formation and Discipleship; Communications; Community Outreach; Finance and Buildings; Music, Arts, and Drama; Spiritual Enrichment and Nurture; and Welcome and Inclusion. In addition to these groups, a special buildings project group was acting in 2020 to look at specific plans for the church and church hall buildings. All groups report to the PCC.

From November 2020 no member of the PCC undertook the role of Treasurer, and so the PCC resolved to appoint a non-member to be the church's Treasurer until the next APCM.

RISK MANAGEMENT

The PCC is resolved to take appropriate steps to manage and mitigate governance, external, operational, legal/regulatory including safeguarding, and financial risks. These steps include regular



monitoring of risk and identifying means to mitigate risks. This includes *inter alia* data protection compliance, a reserves policy, a Parish continuity plan, safeguarding policies, and health and safety risk assessments. In 2020, the Parish continuity plan and health and safety risk assessments were revised to include the risks associated with the coronavirus pandemic. Appropriate financial systems and procedures have been established to manage and identify financial risks. Budgetary and accounting risks are minimised by continual scrutiny of the accounts by the PCC at its regular meetings, and financial summaries are routinely circulated to the PCC between meetings.

PUBLIC BENEFIT

The Trustees confirm that they have complied with the duty of Section 4 of the Charities Act 2006 to have due regard to the Charity Commission's general guidance on public benefit when reviewing the charity's aims and objectives, and in planning activities and setting policies and priorities for the year ahead.

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).

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 charity's 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.

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 1993 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 PCC

Gillian Tyler
PCC Secretary

ACTIVITIES, MISSION, AND OBJECTIVES

St Luke's PCC worked with the Incumbent, the Rev Jackie Doyle-Brett, in promoting the Ecclesiastical Parish, and the whole mission of the Church of England – pastoral, evangelistic, social, and ecumenical. In addition to its stated charitable objective of promoting the Ecclesiastical Parish, the PCC has resolved that

- **We believe in one God: Father, Son, and Holy Spirit;**
- **We are a Christian family of people who worship and serve God; and,**
- **We are a praying community, committed to caring for one another and those in our community, and sharing God's love with everyone.**

The PCC is also specifically responsible for maintaining St Luke's Church Hall in Shipton Street, York, which is located adjacent to the church building.

WORSHIP AND PRAYER

The PCC is committed to enabling as many people as possible to become part of the worshipping community of the church, as well as working to care of the residents of the whole Ecclesiastical Parish. The PCC maintains an overview of the governance of the parish, as well as its worship and missional activities, and appoints individuals and creates groups to help facilitate its mission.

Services

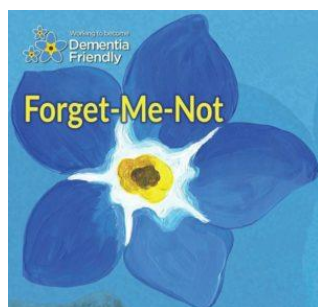
St Luke's holds regular services of divine worship and occasional offices. These are offered during the week and throughout the year, which the community finds socially beneficial and spiritually uplifting. As an inclusive church, the PCC ensures that all services are provided in meaningful ways; the sacraments are rooted in Scripture that declares all God's children are loved. Together, the church community explores what this means for St Luke's and the wider Church.

Until the national lockdown restrictions resulting from the coronavirus pandemic came into force in March 2020, St Luke's held regular services of divine worship in the church building throughout the week. Additional services were also held from time to time to serve specific groups, or to respond to needs. The church's worship included:

- **Sunday services**, in accordance with the Canons of the Church of England, with additional time for reflection during the service and a time for refreshments socialisation afterwards;
- **Morning prayer**, on some week-day mornings;
- **Mid-week Eucharist**, on some Wednesday evenings;
- **Forget-Me-Not**, a simple service for those living with dementia and their carers, with a chance for refreshments and socialisation afterwards;
- **4everyone**, a monthly short, fun service for families with young children.
- **Church Differently**, a monthly service held on the first Tuesday of every month and organised and led by young people, with a specific mission to reach young adults and students as an alternative to inherited forms of church; and,

- **outsideIN**, a monthly Eucharist or service of prayer held on the first Saturday of every month, serving people who identify as LGBTQ+, their friends, and all who are committed to inclusion.

Both ordained and lay members of the congregation also provided spiritual direction, prayer, study groups, and other forms of worship on regular occasions.



After the imposition of lockdown restrictions in March 2020, the church building was closed. St Luke's began to offer pre-recorded services released on Sunday mornings, in place of the usual primary Sunday service. No other regular services were held physically. These services were filmed and edited by members of the congregation. They included all the components of a Eucharistic service, including authorised liturgy for spiritual communion. The church musicians and choir recorded their individual parts to hymns and songs which were included in the recordings.



Other live, virtual services were held. The 4everyone service was conducted via *Zoom* and continued to engage families and young children. During the year, the outsideIN services were also held via *Zoom*, and that worshipping community grew substantially.



Once restrictions permitted the resumption of religious services, St. Luke's continued to be limited by health, safety, and social distancing guidelines. Eucharistic services and evening prayer resumed in the church building, requiring pre-booking to attend. Holy Communion was administered in one kind only, and services were conducted according to COVID-safe guidelines and procedures issued by the government and the Diocese. The opportunity for socialisation and refreshments was a marked absence, much missed by the worshipping community.

The Church's festal services at Easter and Christmas in 2020 were affected by the pandemic. At Easter, the church building was closed, and so an online service was created. At Christmas, physical services were held in the church building, with an overall attendance of 77 worshippers; however, this is an increase of approximately 20 worshippers compared to the physical services held over Christmas in the previous year.

Occasional Offices

In addition to regular and routine services, St Luke's enables the Parish and others to celebrate and give thanks to God at the milestones of a person's journey through life. This is conducted through baptism, in which we give thanks to God for the gift of a new child and commit them to the church community; the public declarations of love and the exchanging of the vows of marriage; and enabling at funerals the expression of families' grief in the loss of their loved ones, and the sure hope of the resurrection of the dead and the commendation of the dead into the hands of God.

The performance of the occasional offices of baptisms, marriages, and funerals was hindered by the coronavirus pandemic and the restrictions imposed on religious services. However, during 2020 St Luke's was able to celebrate six baptisms, two weddings, and conduct eight funeral services.

Music, Arts, and Drama

The pandemic helped St Luke's to explore new ways of using music, arts, and drama in online worship. Much of what the church did over the year would not have been possible without the time and technical expertise of members of the congregation and PCC, and St Luke's is extremely grateful for

their skills. The choir produced an online carol concert; intercessions have included the use of Lego, arts, and crafts; and an online nativity play was also produced.

St Luke's is indebted to its team of worship leaders, musicians, technical producers, and other worshippers to produce weekly online services in a variety of formats and using a variety of media. Guided by the Holy Spirit, the church prays that in 2021, worship will again resemble a 'normal' pattern, including in-person music and song. St Luke's will continue to make use of the most creative aspects of worship developed during the pandemic to enhance its offer of worship to the Parish.

St Luke's remains affiliated to the Royal School of Church Music and is a partner church of Resound Worship. Both links have been extremely helpful in this year – RSCM provided advice and guidance around singing in worship and Resound Worship generously permitted use of all their material for the church's online services.

MISSION AND EVANGELISM

St Luke's is committed to the mission of the Church of England as expressed in the Five Marks of Mission:

- **Tell** – to proclaim the Good News of the Kingdom;
- **Teach** – to teach, baptise and nurture new believers;
- **Tend** – to respond to human need by loving service;
- **Transform** – to transform unjust structures of society, to challenge violence of every kind, and pursue peace and reconciliation; and,
- **Treasure** – to strive to safeguard the integrity of creation and sustain and renew the life of the earth.

St Luke's has engaged with the *Growing your Church* project within the Diocese. This has involved a project group with wider consultation with the congregation and action plans to develop the work of the church. This project incorporates the Charity Commission guidance on public benefit; in particular, the specific guidance for charities for the advancement of religion.

St Luke's main aim in mission and evangelism is to enable everyone to live out their faith as part of our worshipping community through worship and prayer, the provision of pastoral care, outreach work, and promoting inclusion and affirmation.

Children and Youth Work

St Luke's runs and participates in work specifically aimed at supporting children and young people. In doing so, the PCC ensures compliance with all relevant government, diocesan, and Church of England safeguarding legislation and best practice. This work includes a Sunday School; *Explorers*, a children's group aimed at three- to eleven-year-olds; *Six:16*, a youth group aimed at those of secondary school age; *Pathfinders*, a group for young people aged 10 to 18; and an annual children and youth activities week during the summer.

2020 proved to be a particularly challenging year for the church's children and youth work. Provision of activities on Sunday mornings was reviewed at the end of January 2020 and new ideas and initiatives were planned to be implemented in the succeeding months. During January, February, and in early March, the *Streams* and *Oasis* groups met in the church hall for their own age-appropriate teaching as part of Sunday School, and the 4everyone family eucharist services were held in the first three months of the year. In late March, all provision for children and youth work on Sundays ended due to the impact of the coronavirus pandemic.

The *Explorers* group was meeting regularly on a Friday evening at the start of the year and were working towards a musical production of *David and Goliath* to be performed at Easter. This group's activities were suspended in March. At the end of April, the group resumed virtual sessions and continued to meet in this way for the remainder of the year. Participation in virtual sessions was low, but a small and committed group of children and their parents regularly attended.

The *Six:16* group also met regularly at the start of the year and assisted in the provision of the welcome lunch in January and the 4everyone services in February and March. The group's activities were suspended from late March and are expected to resume in September 2021.

The *Pathfinders* group met in February and visited Bootham School to conduct an astronomy evening. This was a successful event. The group held some online quiz activities from May onwards, but the young people found these difficult to participate in after days of online participation in schoolwork. The group did not meet again in 2020, and its weekend away was cancelled.

The annual activities week was also cancelled and is not projected to run again until 2022, due to the coronavirus pandemic. It is hoped that the activities week can be successfully relaunched in the new church hall, which is anticipated to be complete by that time.

The youth choir, whose singing at the Mothering Sunday service in March was also cancelled, were unable to meet until December. They met in a COVID-safe manner to record a carol for the online carol service.

At Christmas, the *Explorers*, *Pathfinders*, and the youth choir leaders decided to send the children and young people who participate in these groups a Christmas present to show that they were still very much in the church's thoughts and prayers. Forty selection boxes were bought and wrapped, and a team of leaders delivered the presents.

Green and Environmental Work

In keeping with the Church of England's commitment to treasure and safeguard God's creation, the PCC operates and participates in green and environmental initiatives to sustain and renew the life of the earth.

The Church of England's National Environmental Working Group (EWG), in line with UK Government policy, is working towards the target of net zero carbon emissions by 2050, and those parts of the Church that can move faster are strongly encouraged to do so. The Church of England's interim target is a 57% reduction by 2030, compared with a baseline year in 2006.

In line with General Synod's Green Agenda, the Diocese of York has appointed a Green Ambassador, and a member of the PCC has been invited to become a member of the Diocese's Environment Steering Group. All churches are encouraged to work together to achieve this ambitious target as part of the Church's collective Christian discipleship. St Luke's has an excellent record and green thinking is something that runs through much of the PCC's operations. The PCC recognises that to achieve its targets, more volunteers will be required to support its environmental work.

In 2020, St Luke's explored how to become a recognised eco-church. Church media and services continued to highlight environmental and green issues. The PCC is conscious of the environmental impact of its proposed building works, and the PCC resolved to rebuild the church hall to meet current national environmental standards.

Communications

Communicating St Luke's faith, worship, aims, and activities is a year-round activity, and the church is grateful to those who keep it going. Individuals work hard to produce posters, flyers, leaflets, and more – as well as compiling, designing, arranging, printing, and distributing our widely-admired Grapevine magazine and Grapevine Lite. During the pandemic, the production of the weekly church notice sheet was suspended. Coverage of St Luke's church activities was arranged with local print and broadcast media.

A team of three individuals oversaw the St Luke's Facebook page, which is used for announcing upcoming events and reporting on them afterwards; a Facebook group was used as a discussion forum for church members who wished to use it.

During the lockdowns, the team made sure the congregation and the Parish were kept informed of the church's events and activities through regular emails and letters. Online services were streamed via YouTube and accessed through the church's website or by telephone. Those responsible for creating the online services have made a huge contribution to maintaining the sense of St Luke's Church as a living and worshipping community during difficult times.

Community Engagement

Over the year, particularly from April, *Luke's Larder* (part of YourCafe York) had an average of 25-8 people coming, and the total goods taken fed approximately 54 people per week. St Luke's has a team of regular volunteers. The number of customers has risen over the year, with increases during school holiday periods. In addition to the *Larder*, the church has worked with the City of York Support Workers within the church's ward to provide cook boxes for over 252 households during school holidays, feeding over 1,024 people. A surplus of food was received from other organisations, including the



universities and Morrison's supermarket at Christmas, which provided lunch for families who would otherwise have gone without.

St Luke's continues to apply for grants to supplement any donations received to bolster its community work. Arrangements previously made with Marks & Spencer are not secure, and so the church is exploring the possibility of working with other supermarkets to provide a more regular supply of surplus food. This has included a trial of vegetable surplus from Door 84, and this relationship has been strengthened over the year.

Over the year, the Mothers' Union kept in touch with members through the church's Grapevine Lite. Several of the church's members responded to the call for people to sew scrubs for NHS staff. The Parents & Toddlers group has kept in touch with members and assisted with varying needs via the group's Facebook page, often in conjunction with *Luke's Larder* and *Snack Shack*, run from Clifton Green School.

The loss of the *Joyful Connections*, *Tuesday Club*, and usual Mothers' Union and Parent & Toddler groups has been commented on by customers of the *Larder*, local community workers, and local City Councillors. St Luke's is grateful that technology has helped in supplementing this community engagement but recognises that it is no substitute for people in the community meeting together.

The church trusts and prays that it will continue to be able to meet the needs of the community.

Spiritual Nurture and Enrichment

This year presented a total change in the way we live, relate, worship, and work. Over 2020, the Spiritual Nurture and Engagement Team continued to reflect on the possibilities of what and how St Luke's offers "nurture and enrichment" within the congregation and the Parish throughout lockdown. There have been opportunities for online provisions for the majority; however, the team recognised that this has not been possible for everyone and bore that in mind when devising enrichment and nurture resources and activities.

The Prayer Team continued to offer support throughout the year. Prayer requests were gathered online via the church's website and managed by a coordinator, with an agreed protocol of confidentiality. When permitted, services of morning prayer took place in the church building. In Advent (December), the team agreed to offer people a book to use in personal prayer at home. This was *Preparing for Christmas* by Richard Rohr.

St Luke's commitment to spiritual nurture and enrichment extends to all church groups, activities, events, and conversations.

Welcome and Inclusion

St Luke's is committed to the radical inclusion of all God's children in its worship and activities. St Luke's is registered with the Inclusive Church network.

Due to the lockdown restrictions, it has not been possible to welcome families with young children in the usual way. St Luke's eagerly anticipates being able to welcome, include, and support families with young children again in its worship.

St Luke's is committed to making church buildings accessible to all, particularly those with restricted mobility. This remains a high priority and is being fully integrated into the Community Hub project (see the Building Work section on page 19).

In May 2019, St Luke's launched outsideIN, a space which grew from a monthly offering of a safe space Eucharist service for LGBTQ+ people. Its mission statement is to be "a group of LGBTQ+ people and friends who have found that there are no outsiders to God's love and that God welcomes us in to share God's life just as we are". In January, the group began meeting on the first Saturday of each month for a service of evening prayer. In April, this service moved online, becoming a virtual service via *Zoom*. In addition to services of divine worship, the group has held online and, when restrictions permitted, physical social activities for its worshippers. In December 2020, the group welcomed the Rt. Rev. Paul Bayes, Bishop of Liverpool, at its online service, who offered a reflection on the Church of England. This was a very well-received and special event in outsideIN's programme. outsideIN has grown exponentially over 2020. It has continued to flourish in unexpected ways – including in that, since meeting online, the community has grown to include people from other cities and countries. The group welcomed 13 new members in the period March to December 2020, all within the 20-30 age bracket.

In July 2020, the PCC resolved to defer St Luke's sponsorship of York Pride to 2021, reflecting the cancellation of the usual York Pride due to the pandemic. The church remains committed to sponsoring York Pride, alongside other Church of England churches, and ecumenical churches in York.

In November 2020, the Church of England published the *Living in Love and Faith* teaching documents and programme, in line with its continuing discernment around human sexuality, relationships, and marriage. St Luke's is devising how best to engage with the teaching material in 2021, accounting for the Diocese of York's timeframe for engagement.

The PCC express their gratitude to the Worship and Inclusion Team for their hard work over a difficult year.

PASTORAL CARE

St Luke's provides pastoral care across the Ecclesiastical Parish in various ways. Everyone who regularly worships at St Luke's is well known to the PCC and Churchwardens, and their pastoral needs can be identified, and support offered.

In 2020, the Sidespersons Team introduced welcomers, specifically responsible for welcoming new people as they visit the church and join the worshipping community, and to nurture newcomers'

relationships with the church. In January 2020, a special lunch was hosted in the church hall to welcome those who have joined the community in 2019.

There are two Recognised Parish Assistants with specific responsibility for pastoral care, and they provide a listening ear and outreach to the community, as well as the provision of prayer and the sacraments.

The clergy of the church, including the Incumbent, are well known in the Ecclesiastical Parish. This recognition has been achieved through *walking the Lane*, and actively engaging with schools and local businesses. Contacts and relationships have been built through *Messy Church*.

WORK WITHIN THE CHURCH OF ENGLAND

The three Deanery Synod Representative members of the PCC sit on the Deanery Synod for York Deanery. The Deanery Synod considers growth, mission, evangelism, and other matters which concern churches in the city centre and local area. This provides the PCC with an important link between St Luke's and the wider work of local churches. In 2020, this included participation in consultation work for the Diocese of York's *Living Christ's Story* project.

Two members of the PCC have been elected to sit on the Deanery Leadership Team, which is the steering committee for York Deanery. Additionally, one member of the PCC has been elected Diocesan Synod for the Diocese of York, which considers diocesan-wide matters; and the Incumbent was a member of the Church of England's General Synod.

ECUMENICAL RELATIONS

St Luke's works with churches of other Christian denominations for certain projects throughout the year. Ordinarily, this would include work with local Methodist, United Reformed Church, and groups within the Roman Catholic Church in support of York Pride. Due to the coronavirus pandemic, York Pride was not held in 2020. The PCC remains committed to working alongside other Christians, and other religious groups, to promote inclusion and affirmation.

VOLUNTEERS AND LAY WORKERS

The PCC is grateful that it has been supported by numerous volunteers over the year, who together make the church a praying, caring, and sharing presence in the Ecclesiastical Parish and beyond. The PCC recognises that without the work of the church's volunteers, it could not operate such a welcoming and inclusive church.

Recognised Parish Assistants

Three members of the congregation have undertaken the Diocese of York's Recognised Parish Assistant course. These individuals are licensed and permitted to visit parishioners, administer the reserved sacrament to the sick and housebound, undertake hospital and bereavement visits, assist the celebrant at services in sheltered accommodation and care homes in the parish, administer the chalice at Holy Communion, and be part of the prayer and ministry team.

Sidespersons

Sidespersons are an office established under Canon E2 (Of sidesmen or assistants to the churchwardens), who are appointed by the parochial church council to “promote the cause of true religion in the Parish and to assist the churchwardens in the discharge of their duties in maintaining order and decency in the church and churchyard, especially during the time of divine service”.

At St Luke’s, specific duties include welcoming people when they come into church, and enabling services to take place in good order. They are responsible for ensuring the information displays are up to date, taking the offering, and guiding congregants during the Eucharist.

As St Luke’s has committed to being a radically inclusive church, the role of sidesperson is extended to include *Welcomers*. Their specific responsibility is to ensure people feel fully welcomed at services, and are identifiable to the congregation. As part of their welcome, Welcomers ensure that new visitors are looked after following services, including by introducing them to other members of the congregation, and ministers. The Welcomers are responsible for providing information about the church, its services, and its wider mission.

In 2020, there were 25 sidespersons; 17 of whom were sidespersons, 12 were Welcomers, and two held both responsibilities.

Other Volunteers

St Luke’s does not employ any staff, and so all the church’s activities are carried out on a voluntary basis. This includes a church hall secretary, pastoral support, prayer loop volunteers, eucharistic assistants, and all members of the groups mentioned in this report which contribute to and facilitate the life and work of the church.

BUILDINGS WORK



The St Luke’s Community Hub project was born out of a Leading Your Church into Growth course which the church congregation did together in 2017 and our Plan4Growth was launched in January 2018. Whilst ideas for several elements of the project had been around for some years, the need for building facilities that would facilitate our mission and growth in the Parish brought these ideas and more together in the SLCH project. The heart of the project makes our buildings accessible but creates flexible spaces for community needs. The Church Hall is rebuilt in brick and includes fully accessible toilets and a catering standard kitchen; the Church Hall is linked to the Church building with a new foyer and link which becomes the new main entrance to our buildings; level access is provided to all of our building entrances; the chapels in the Church are created as separate useable spaces with glazed

infill to the chancel archways; and parking provision for a funeral hearse is provided to the front of the church on Burton Stone Lane.

Planning consent for the c£0.5m project was granted in September and a Reserved Matters application has been made to the Council to remove two onerous conditions relating to standards of environmental sustainability which would otherwise make the project unviable. Building Regulations approval was obtained in August, and a Church of England Faculty application was made in October. 70% of the project is being funded from a generous legacy, part of which is tied up in a property which is being sold. The balance is being met through Gift Days, grant applications and other fund-raising activity.



FINANCIAL REPORT

INDEPENDENT EXAMINER'S REPORT

Report to the trustees/members of THE PAROCHIAL CHURCH COUNCIL OF THE ECCLESIASTICAL PARISH OF ST LUKE THE EVANGELIST YORK

On the accounts for the year ended 31 December 2020

Charity number 1185606

Set out on pages 25 – 32

Responsibilities and basis of report I report my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2020.

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.

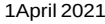
Independent Examiner's Statement The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of The Chartered Institute of Management Accountants and The Association of International Accountants.

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.

Signed:  **Date:** 

Name:

Relevant professional qualification(s)

Address:

OVERVIEW

2020 has been an unprecedented year, with almost everyone affected financially by the pandemic, and St Luke's was no exception. The Accounts show total reserves of £206,298 which includes the Designated Fund (Legacy) of £160,495; Hall and Building Fund of £39,128; and the General Fund of £2,686 – a reduction of £11,307 against 2019 unrestricted funds. The General Fund now falls short of the benchmark of £27,000 due, in the main, to a reduction in income and additional unexpected costs on building work and church maintenance. The legacy fund expenditure is referenced in the buildings work section of this report on page 19.

INCOME

Total unrestricted receipts were £80,893. The church was in receipt of an increase in donations by bank transactions, due in part to conversion from stewardship envelope giving, which was not possible during the times the church building was closed. Due to those closures, regular giving and loose plate collections saw a reduction of £4,744 year-on-year. However, the generosity of the congregation at St Luke's was evidenced in the church's Gift Day, which saw an unprecedentedly large amount of donations, totalling £25,575 (pre-gift aid) in donations for the Community Hub project. The gift aid for those donations is expected to be received in 2021.

St Luke's received a grant of £328.88 from the Sunday Schools Committee, however that Trust has now been wound up due to a lack of investment income. No grant was this year received from the Clifton Ward Committee, which would ordinarily cover the operating costs of producing Grapevine Lite, and the Activity Week which did not run. St Luke's anticipates that grant being continued in 2021.

Gift aid receipt in 2020 was £16,561, which is a decrease from the previous year, but still provides for 19% of our unrestricted income.

Due to the pandemic, the income from hall lettings was substantially lower than in previous years.

INVESTMENTS

To safeguard the church's finances following the receipt of the legacy, the PCC authorised the transference of up to £85,000 in separate ethical financial institutions so that, should there be any failures in the banking sector due to the pandemic, the funds would be covered by the Financial Services Compensation Scheme. This has resulted in slightly less favourable interest rates, but it was felt that this was a price worth paying to dutifully safeguard the church's funds.

EXPENDITURE

There was no correlating decrease in expenditure comparable to income. The Free Will Offering to the Diocese of York amounted to £61,560 and is the largest item of expenditure at 68% of unrestricted payments. Our Mission Giving was £9,060 with a further £10,000 donated to Holy Evangelists, Shipton by Beningbrough for their new toilets. There is a corresponding entry in the balance sheet transferring this amount to the General Fund from the Legacy Fund.

There was a reduction in church running expenses due to the closures of the church building throughout the year. However, some fixed costs (i.e., insurance, photocopier lease, utility bills, etc.) continued to be paid. Gas bills were slightly higher than expected to maintain the integrity of the church fabric and organ. Maintenance is higher due to necessary expenses arising from the quinquennial inspection.

Significant items of expenditure are detailed in the notes to the accounts on page 31.

RESERVES

The PCC's Reserves Policy is in line with the Diocesan guidance approximating to four months' worth of unrestricted payments. This would imply a suitable level of general reserves of £27,000 designated as *General Reserve* for St Luke's. Reserves funds are invested with the Church of England's CBF Deposit Fund, or with other ethical financial institutions.

The balance for reserves at the end of 2020 were:

- General Reserve £2,656
- Legacy £160,495
- Mission £300

Notably, the general reserves balance is substantially lower than the benchmark. The PCC is committed to the safeguarding of the church's future and is resolved to improve the reserves balance when possible.

STATEMENT OF GOING CONCERN

The accounts were prepared on a going concern basis. The Trustees have concluded that the charity is a going concern.

The church can meet its operating costs and holds a suitable amount in total reserves. Whilst its benchmark for reserves is against the general reserves, the legacy reserves can be utilised to meet operational needs. The church has a series of generous giving initiatives planned to run in September and October 2021, in line with the Diocese of York's generous giving scheme. As the church has reopened for services due to changes in national restrictions, loose plate collection income has resumed.

The church intends to use the legacy reserve for building works on the church and church hall. The church has experienced a decline in giving during the coronavirus pandemic, and a loss of income from the church hall lettings. The church intends to promote the use of electronic giving to supplement lost loose plate collection income and other donations. The church can apply to the Diocese of York for financial support if necessary.

David Boyd, Treasurer

A large, handwritten signature in black ink, which appears to read 'David Boyd'.

STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted Funds	Restricted Funds	Endowment Funds	Total Funds	Prior Year Total Funds
Receipts					
Voluntary Income					
Planned Giving	60,080	40	—	60,120	63,179
Collection at services	685	—	—	685	1,767
Donations	1,269	1,498	—	2,767	2,193
Gift Day	—	25,575	—	25,575	4,414
Grants	328	—	—	328	190
All other giving/voluntary income	156	—	—	156	225,959
Gift Aid recovered	15,575	985	—	16,561	16,985
Activities for Generating Funds	1,077	—	—	1,077	4,864
Investment income	665	1	—	666	549
Church Activities	1,055	44	—	1,099	2,780
Other incoming resources	—	—	—	—	—
Total income	80,893	28,143	—	109,037	322,885
Payments					
Church activities					
Free Will Offering	61,560	—	—	61,560	59,760
Clergy and Staffing	3,464	93	—	3,557	4,824
Church running expenses	14,090	909	—	14,999	20,380
Hall running costs	2,013	—	—	2,013	2,851
Church Major Repairs	39,948	—	—	39,948	1,725
Hall Major Repairs	2,325	—	—	2,325	—
Mission giving & donations	19,060	—	—	19,060	9,140
Cost of generating funds					
Costs of generating voluntary income	58	—	—	58	57
Fundraising Trading costs	56	260	—	317	191
Investment management costs	90	—	—	90	—
New Building Work	11,931	—	—	11,931	750
Total expenditure	154,598	1,262	—	155,861	99,680
Net income / (expenditure) resources before transfer	(73,705)	26,880	—	(46,824)	223,205
Transfers					
Gross transfers between funds - in	10,000	—	—	10,000	2,781
Gross transfers between funds - out	(10,000)	—	—	(10,000)	(2,781)
Other recognised gains / losses	—	—	—	—	—
Gains / losses on investment assets	—	—	—	—	—
Gains on revaluation, fixed assets, charity's own use	—	—	—	—	—
Net movement in funds	(73,705)	26,880	—	(46,824)	223,205
Total funds brought forward	237,157	15,965	—	253,123	29,918
Total funds carried forward	163,452	42,846	—	206,298	253,123
Represented by					
Unrestricted					
General fund	2,656	—	—	2,656	13,963
Designated					
Building Fund	—	—	—	—	—
Legacy Fund	160,495	—	—	160,495	222,894
Mission	300	—	—	300	300



Restricted

Building Fund	—	12,924	—	12,924	11,993
CAC Travel	—	285	—	285	285
Community Fund	—	280	—	280	373
Flower Fund	—	47	—	47	—
Green Group Fund	—	159	—	159	132
Hall Building	—	26,204	—	26,204	200
Lukes Larder	—	604	—	604	—
Magazine Fund	—	1,485	—	1,485	2,017
Mission	—	(24)	—	(24)	(24)
Mums & Toddlers	—	—	—	—	—
Music Fund	—	415	—	415	441
Sunnydene	—	—	—	—	—
Youth Fund	—	465	—	465	546

BALANCE SHEET**Current assets**

	Total Funds	Prior Year Funds
Debtors	28	169
Cash at bank and in hand	206,718	254,880
	206,747	255,050

Liabilities

Creditors: Amounts falling due in one year	448	1,926
	448	1,926

Net current assets less current liabilities**206,298** **253,123****Total assets less current liabilities****206,298** **253,123****Total net assets less liabilities****206,298** **253,123****Represented by****Unrestricted**

General fund	2,656	13,963
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Designated

Mission	300	300
Building Fund	—	—
Legacy Fund	160,495	222,894

Restricted

CAC Travel	285	285
Building Fund	12,924	11,993
Hall Building	26,204	200
Sunnydene	—	—
Mums & Toddlers	—	—
Community Fund	280	373
Green Group Fund	159	132
Lukes Larder	604	—
Magazine Fund	1,485	2,017
Mission	(24)	(24)
Flower Fund	47	—
Youth Fund	465	546
Music Fund	415	441

Funds of the church**206,298** **253,123**

STATEMENT OF ASSETS AND LIABILITIES

	General	Designated	Restricted	Endowment	This Year	Last Year
Current assets - Cash at bank and in hand						
Bank current account -	(18,069)	12,545	41,398	—	35,874	7,074
CCLA (CBF) deposit account -	21,334	62,878	1,259	—	85,472	247,805
Flagstone Investment Management -	—	85,371	—	—	85,371	—
Totals	3,265	160,795	42,657	—	206,718	254,880
Current assets - Debtors						
Accounts Receivable -	28	—	—	—	28	169
Totals	28	—	—	—	28	169
Liabilities - Agency accounts						
Agency collections -	—	—	(188)	—	(188)	398
Totals	—	—	(188)	—	(188)	398
Liabilities - Creditors: Amounts falling due in one year						
Accounts Payable -	637	—	—	—	637	1,528
Totals	637	—	—	—	637	1,528
Grand total	2,656	160,795	42,846	—	206,298	253,123

ANALYSIS OF INCOME AND EXPENDITURE

INCOME AND ENDOWMENTS

	Unrestricted	Designated	Restricted	Endowment	This Year	Last Year
Voluntary Income - Planned Giving						
0101 - Gift Aid - Bank	56,296	—	40	—	56,336	55,733
0110 - Gift Aid - Envelopes	2,344	—	—	—	2,344	5,424
0111 - GAYE	—	—	—	—	—	—
0201 - Other planned giving	1,440	—	—	—	1,440	2,022
Total	60,080	—	40	—	60,120	63,179
Voluntary Income - Collection at services						
0301 - Loose plate collections	685	—	—	—	685	1,767
Total	685	—	—	—	685	1,767
Voluntary Income - Donations						
0501 - Donations Appeals etc. - Gift Aid	797	—	339	—	1,136	661
0502 - Donations, Appeals etc. - Other	472	—	1,158	—	1,631	1,532
Total	1,269	—	1,498	—	2,767	2,193
Voluntary Income - Gift Day						
0401 - Regular Gift Days - Gift Aid	—	—	5,425	—	5,425	3,245
0402 - Regular Gift Days - Other	—	—	20,150	—	20,150	1,169
Total	—	—	25,575	—	25,575	4,414
Voluntary Income - Grants						
0801 - Recurring grants	328	—	—	—	328	—
08A1 - Non-recurring one-off grants	—	—	—	—	—	190
Total	328	—	—	—	328	190

Voluntary Income - All other giving/voluntary income

0410 - Giving through church boxes	—	—	—	—	—	—
0415 - Refreshments	156	—	—	—	156	959
0510 - Gifts of quoted securities	—	—	—	—	—	—
0701 - Legacies	—	—	—	—	—	225,000
Total	156	—	—	—	156	225,959

Voluntary Income - Gift Aid recovered

0601 - Tax recoverable on Gift Aid	15,575	—	985	—	16,561	16,985
Total	15,575	—	985	—	16,561	16,985

Activities for Generating Funds

0901 - Other funds generated	—	—	—	—	—	22
0910 - Coffee Mornings, Concerts & other events	37	—	—	—	37	353
0920 - Sunnyside Income	—	—	—	—	—	—
1220 - Bookstall sales - fund raising	—	—	—	—	—	30
1240 - Church Hall lettings - fund raising	1,019	—	—	—	1,019	4,395
1250 - Magazine income - advertising	—	—	—	—	—	—
1265 - Photocopy sales	20	—	—	—	20	64
Total	1,077	—	—	—	1,077	4,864

Investment income

1001 - Dividends	—	—	—	—	—	—
1020 - Bank and building society interest	156	508	1	—	666	549
1030 - Rent from lands or buildings	—	—	—	—	—	—
Total	156	508	1	—	666	549

Church Activities

1101 - Fees for weddings and funerals	955	—	—	—	955	1,296
1210 - Bookstall sales to promote objectives	100	—	—	—	100	—
1230 - Church Hall lettings - objectives	—	—	—	—	—	—
1260 - Parish magazine sales	—	—	—	—	—	—
1270 - Children's Work	—	—	44	—	44	408
1271 - Pathfinder Weekend	—	—	—	—	—	935
1272 - Activity Week	—	—	—	—	—	141
Total	1,055	—	44	—	1,099	2,780

Other incoming resources

1310 - Insurance claims	—	—	—	—	—	—
1320 - Surplus - sales of fixed assets	—	—	—	—	—	—
Total	—	—	—	—	—	—
INCOME TOTAL	80,384	508	28,143	—	109,037	322,885

EXPENDITURE

	Unrestricted	Designated	Restricted	Endowment	This Year	Last Year
<i>Church activities - Free Will Offering</i>						
1901 - Stipends Quota	—	—	—	—	—	—
1910 - Free Will Offering	61,560	—	—	—	61,560	59,760
Total	61,560	—	—	—	61,560	59,760
<i>Church activities - Clergy and Staffing</i>						
2001 - Assistant staff costs	11	—	—	—	11	63
2010 - Salary of Organist	1,810	—	—	—	1,810	2,440
2040 - Salary of PA to Incumbent	—	—	—	—	—	—
2050 - Salary of Parish administrator	—	—	—	—	—	—
2060 - Salary of Community Worker	400	—	93	—	493	1,042
2101 - Working expenses of incumbent	398	—	—	—	398	303
2120 - Council tax	—	—	—	—	—	—
2130 - Vicarage Costs	—	—	—	—	—	180
2140 - Vicarage Water	440	—	—	—	440	422
2145 - Parsonage - water	—	—	—	—	—	—
2150 - Vicar's telephone	402	—	—	—	402	371
2180 - Visiting speakers	—	—	—	—	—	—
Total	3,464	—	93	—	3,557	4,824
<i>Church activities - Church running expenses</i>						
2170 - Training	—	—	—	—	—	—
2201 - Parish training and mission	200	—	—	—	200	386
2202 - Children's Work	—	—	185	—	185	1,001
2203 - Activity Week	—	—	—	—	—	528
2204 - Pathfinder Weekend	—	—	—	—	—	881
2301 - Church running - insurance	2,128	—	—	—	2,128	2,082
2310 - Church office - telephone	626	—	—	—	626	624
2314 - Photocopier Service	412	—	—	—	412	664
2315 - Photocopier Lease	1,195	—	—	—	1,195	1,022
2320 - Organ / piano tuning	265	—	—	—	265	79
2330 - Church maintenance	4,625	—	—	—	4,625	3,390
2331 - Cleaning	—	—	—	—	—	—
2340 - Upkeep of services	949	—	191	—	1,141	2,457
2350 - Upkeep of churchyard	—	—	—	—	—	—
2360 - Administration	241	—	—	—	241	783
2375 - Refreshments	97	—	—	—	97	458
2401 - Church running - electric	616	—	—	—	616	738
2410 - Church running - gas	2,197	—	—	—	2,197	3,382
2420 - Church running - water	—	—	—	—	—	—
2430 - Church running - oil	—	—	—	—	—	—
2440 - Church running - heating and lighting	—	—	—	—	—	182
2501 - Magazine expenses	532	—	532	—	1,065	1,597
2601 - Governance costs	—	—	—	—	—	15
examination/audit fee	—	—	—	—	—	—
2602 - PCC Meeting Costs	—	—	—	—	—	100
Total	14,090	—	909	—	14,999	20,380
<i>Church activities - Hall running costs</i>						
2520 - Hall running - oil	—	—	—	—	—	—
2530 - Hall running - electricity	—	—	—	—	—	—



2540 - Hall running - gas	586	—	—	—	586	1,191
2550 - Hall running - insurance	1,110	—	—	—	1,110	1,086
2560 - Hall running - maintenance	77	—	—	—	77	180
2565 - Hall Running - Cleaner	—	—	—	—	—	—
2570 - Hall running - telephone	—	—	—	—	—	—
2580 - Hall running - water	239	—	—	—	239	333
2590 - Hall running - heating and lighting	—	—	—	—	—	60
Total	2,013	—	—	—	2,013	2,851
<i>Church activities - Church Major Repairs</i>						
2701 - Church major repairs - structure	—	18,071	—	—	18,071	1,725
2710 - Church major repairs - installation	—	19,800	—	—	19,800	—
2720 - Church interior and exterior decorating	1,387	690	—	—	2,077	—
Total	1,387	38,561	—	—	39,948	1,725
<i>Church activities - Hall Major Repairs</i>						
2801 - Hall + major repairs - structure	—	2,000	—	—	2,000	—
2820 - Hall + major repairs - installation	—	—	—	—	—	—
2830 - Hall + interior and exterior decorating	—	—	—	—	—	—
2840 - Other PCC property upkeep	—	325	—	—	325	—
Total	—	2,325	—	—	2,325	—
<i>Church activities - Mission giving & donations</i>						
1801 - Giving to Missionary Societies	1,810	—	—	—	1,810	1,830
1830 - Giving - Relief and Development Agencies	1,810	—	—	—	1,810	1,830
1850 - Home Mission	12,720	—	—	—	12,720	1,370
1870 - Secular Charities	2,720	—	—	—	2,720	4,110
Total	19,060	—	—	—	19,060	9,140
<i>Cost of generating funds - Costs of generating voluntary income</i>						
1701 - Fees paid to fund raisers	—	—	—	—	—	—
1710 - Costs of applying for grants	—	—	—	—	—	—
1720 - Costs of stewardship campaign	58	—	—	—	58	57
Total	58	—	—	—	58	57
<i>Cost of generating funds - Fundraising Trading costs</i>						
1730 - Costs of Coffee Mornings & other events	56	—	260	—	317	191
1750 - Sunnysdene Payments	—	—	—	—	—	—
2510 - Bookstall costs	—	—	—	—	—	—
Total	56	—	260	—	317	191
<i>Cost of generating funds - Investment management costs</i>						
1740 - Investment management costs	—	90	—	—	90	—
Total	—	90	—	—	90	—

New Building Work

2901 - New building parsonage house	—	—	—	—	—	—
2910 - New building house for curate	—	—	—	—	—	—
2920 - New building Church	—	—	—	—	—	—
2930 - New building Hall	—	11,931	—	—	11,931	750
Total	—	11,931	—	—	11,931	750
EXPENDITURE TOTAL	101,690	52,907	1,262	—	155,861	99,680
GRAND TOTAL	(21,306)	(52,398)	26,880	—	(46,824)	223,205

NOTES – SIGNIFICANT ITEMS OF EXPENDITURE**Collected on behalf of and Paid to Charities**

		<u>TOTAL</u>
Street Angels	20.00	
Children's Society 2019	289.25	
Children's Society 2020	85.00	
Fairer World	382.30	
British Heart Foundation	57.40	
Carecent	473.80	
Shelter	54.81	1362.56

Missionary and Charity Giving

CMS – Becky and Evaldo	1810.00	
Christian Aid	1810.00	
Food Bank	1360.00	
York Mind	1360.00	
Christians Against Poverty	1360.00	
Refugee Action York	1360.00	9060.00

<u>Organist Fees</u>	1810.00	1810.00
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Church Maintenance

Asbestos Survey	1200.00
Fire Extinguishers	418.14
Hand Sanitisers	305.76
Quinquennial Inspection	800.00

Financial Report approved by the Trustees on 05 September 2021

Signature:



Full Name: Mrs Colette Longbottom

Position: PCC Chair

Date:

5/9/21

DECLARATIONS

The Trustees declare that they have approved the Trustees' Report above.

Signature:



Full Name: Mrs Colette Longbottom

Position: PCC Chair

Date:

