

THE TEMPLAR PILGRIMAGE TRUST (OTJ)
TRUSTEES' ANNUAL REPORT
FOR THE PERIOD 1 JANUARY 2023 - 31 DECEMBER 2023

Reference and administration details

Patron Alistair McCabe
President The Grand Prior of the Order of Knights Templar in the United Kingdom

Trustees

Sorin Ionut Balaban*
John Culley (Chair) (Resigned March 2023)
Anthony Cuthbert*
Cicelyn Hinds (Hon. Secretary)
Mavis Jacobs*
Jeremy Lee (Hon. Treasurer)
Rev. Canon Philip Norwood*
Jason Tailby (Resigned March 2023)
George MacLean (Chair) (Appointed June 2023)

Charity number: 1191505

Contact address: 28 Clifford Road, South Norwood, London SE25 5JS

The Trust

The object of the Trust is the advancement of the Christian religion by helping people make journeys of pilgrimage to recognised Christian shrines and helping young people make educational visits to recognised places of Christian worship or learning. The shrines and places of worship may be in this country or overseas.

The Trust is a Charitable Incorporated Organisation ('CIO') whose only voting members are its charity trustees. The Trust's governing document is a CIO Foundation Constitution, registered on 28 September 2020.

The Trust succeeded the Templar Pilgrimage Trust (OTJ), charity number 326561, which was established in 1984 under a deed of trust. That charity was closed in November 2021, its funds being transferred to the Trust to enable the continuation of its charitable work.

The Trust was originally founded in the 1980s by members of the Knights Templar and current donors include Members of the Grand Priory of Knights Templar in the United Kingdom ('the Grand Priory' / 'GPUK'). The Trustees, therefore, consider it appropriate to maintain links with the Grand Priory and a Memorandum of Understanding dated 20 July 2021 sets out the basis on which the two organisations aim to work together.

The Trustees

The Trust is managed by a board of eight trustees. Currently, four Trustees are Members of the Grand Priory and four are independent of the Grand Priory. The Trustees come from different Christian denominations: the board includes members of the Church of England, the Romanian Orthodox Church and the Roman Catholic Church.

The Trustees' names are set out on page 1. The Trustees whose names are marked with an asterisk are Members of the Grand Priory. Anthony Cuthbert, the serving Grand Prior, is the Trust's President.

The Trustees met six times during 2023. All the meetings took place as videoconferences.

The Trustees also maintained contact by e-mail between meetings.

The Trust's Activities

The Trust's main activity is making grants to groups and individuals planning to make pilgrimages. Without the Trust's financial support, it would be difficult, if not impossible, for them to do so.

During the year, the Trust which amounted to £5405 (2022: £6665). The Trustees were pleased to note that there was a wider range of applicants, all of whom made initial enquiries through the Trust's website.

The Trust's finances are covered in more detail on page 3.

At their four regular meetings, the Trustees reviewed reports and updates on the Trust's finances, grants and marketing activity. They also reviewed the Trust's governance and its marketing generally, as well as its Safeguarding and Data Protection Policies. The Trustees discussed safeguarding in considerable detail during 2022. They recognised that the Charity Commission expects charities to identify and manage safeguarding risks to which it may be exposed. They held two additional meetings devoted exclusively to safeguarding matters. The Trustees reviewed the Trust's situation. It does not meet applicants face-to-face but communicates with them in writing. Applicants make their own arrangements (for example, whether to travel alone or in a group, whether to use a tour company) so that the Trust does not select any tour or travel companies. The Trust's work does not involve caring for or supervising children or adults at risk of abuse. Nevertheless, the Trustees had concluded it was appropriate for applicants to provide assurance that organisations arranging pilgrimages had considered safeguarding risks and taken appropriate steps to manage those risks. They reviewed the existing policy, which required confirmation from organisations should be provided before a grant was paid. They decided that pilgrims travelling alone should assume responsibility for managing their own safeguarding risks and that pilgrims under 18 would not be given grants unless they were travelling in a group, because of the significantly increased risks that under 18s would assume by travelling alone.

The Trustees confirm they referred to the guidance from the Charity Commission on public benefit when reviewing the Trust's governance, as well as when considering its activities, aims and objectives.

Finances

The Income and Expenditure Account for 2023 is attached as an appendix to this Report. At the beginning of the year, the General Fund stood at £18416. At the end of the year, it stood at £22560. Grants agreed amounted to £5405 (2021: £6000).

The Trustees set a grants budget at the beginning of each year. Having agreed it would be appropriate to use capital to increase the amounts paid in grants, at the beginning of

2022 the Trustees set a grants budget above the level of donations they expected to receive. In setting the grants budget, the Trustees were mindful of their aim to make grants to as wide a range of pilgrims as possible. Later in the year, it also became clear that rising inflation meant the costs of making pilgrimages, which had been rising, would be rising further, so reducing the real value of the grants the Trust makes. The Trustees feel it is important for grants to lose as little value as possible, because significant losses in value could call into question the value of the Trust's activities.

Donations in 2023 were £5392 (2022: £1560). There was also an increase in returned (unused) grants of £1700 (2022, £NIL).

Trustees noted the increase in domestic pilgrimage requests as there were growing tensions in the Middle East. This meant that sums involved were considerably lower than in previous years.

The Trustees wish once again to record their thanks for continuing donations from Members of the Order and from friends of the Order. They wish to thank donors who have covered costs relating to the operation of the Trust. They also take this opportunity to confirm that Trustees do not receive any remuneration from the Trust.

It gives me great pleasure to present this year's Temple Pilgrimage Trust Annual Report and Accounts.

This is my first year as year of being the Chair of the TPT and I am very honoured to be involved with the interests and goals of the Trust. This year Trustees have managed funds in accordance with the rules of good governance issued by the Charities Commission once again and have maintained a favourable number of grants this year. With pilgrims unable to travel to the Holy Land because of the conflicts, Trustees have noticed more and more popular destinations for pilgrims seeking help. We have also maintained our block grants to organisations which focus on taking young people to either Lourdes or to Walsingham here in the UK, as Trustees understand participating in pilgrimage from an early age will have a lifelong benefit.

Financial pressures have seen small charities struggle with fundraising and is always looking for new benefactors to enable us to continue in our important and excellent work. Trustees regular meeting schedule has changed this year since so many requests for funding are looking for a summer departure date rather than spread evenly throughout the year and we believe this is due, on the whole, to pilgrims no longer seeing the Holy Land as a possible and safe destination.

I would like to thank the existing Trustees for making me so welcome and for trusting me with the important role of Chair of this Trust and I look forward to working together to meet our goals in the years ahead.

George MacLean
Chair

THE TEMPLAR PILGRIMAGE TRUST (Registered Charity 1191505)			
<u>INCOME & EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31st DECEMBER 2023</u>			
Income			2022
Donations received	5392		1560
Returned Grants	1700		0
Gift Aid Reclaimed	1239		256
Interest on Investment account	394		92
Accumulation Fund increase in value	1030		-841
	9754		1067
Expenditure			
Insurance	96		320
Zoom annual subsription	101		
Website			345
Website domain protection	9		
Grants	5405		6000
	5611		6665
Excess of Income over Expenditure	4144		-5598
Assets	as at 31.12.23		31.12.22
LLOYDS Current Accounts	2195		1542
COIF Deposit Fund	11442		9048
COIF Ethical Investment Fund	8856		7826
PayPal	66		0
	22560		18416