

FRIENDS OF THE IMMACULATE HEART SISTERS

England & Wales · Charity number 1194081

Details

Other names	IHCIO, IMMACULATE HEART CIO, IMMACULATE HEART OF MARY CIO
Status	Registered
Legal form	CIO
Registered	2021-04-13
Register	View on the Charity Commission register

Contact

Address	8 Ashbury Lane Sheffield S8 8LF
Phone	07551777734
Email	marianfranciscans7@gmail.com

Activities

Objects: TO ADVANCE THE ROMAN CATHOLIC RELIGION FOR THE PUBLIC BENEFIT, IN PARTICULAR BY SUPPORTING THE ROMAN CATHOLIC ASSOCIATION OF CONSECRATED WOMEN KNOWN AS THE FRANCISCAN FAMILY OF THE IMMACULATE HEART AND OF ST MAXIMILLIAN BY THE PROVISION OF RESOURCES SUCH AS ACCOMMODATION, SUSTENANCE, TRAINING, DEVELOPMENT AND OTHER ACTIVITIES THAT FURTHER THE ROMAN CATHOLIC FAITH.

Activities: Furthering the Roman Catholic faith for the public benefit, through direct support of the Roman Catholic Association of consecrated women known as the Franciscan Family of the Immaculate Heart and of St Maximilian. Providing resources such as accommodation, sustenance, training, and development to this association, and also supporting other activities that further the Roman Catholic faith.

Classification

- **How:** Provides Other Finance, Provides Services
- **What:** Religious Activities
- **Who:** Other Defined Groups, The General Public/mankind

Geography

- Guernsey
- Throughout England

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	-	-	-	-
2023-12-31	£79,131	£39,720	-	-
2022-12-31	£92,157	£19,534	-	-
2021-12-31	£6,228	£2,709	-	-

Trustees

Name	Role	Appointed
Dr Timothy David Craggs	Chair	2021-05-13
James Bogle Esq		2022-08-29
PAUL RICHARD WADDINGTON		2023-12-22
Sara Agnes Buscombe		2021-05-13

FRIENDS OF THE IMMACULATE HEART SISTERS

England & Wales - Charity number 1194081

Accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES

FRIENDS OF THE IMMACULATE HEART SISTERS

No (if any)

For the period from

1194081

Receipts and payments accounts

CC16a

For the period
from

Period start
1/1/23

To

Period end
12/31/23

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
DONATIONS	56,131	-	-	56,131	92,157
GRANTS	23,000	-	-	23,000	-
	- 0	-	-	-	-
	- 0	-	-	-	-
	- 0	-	-	-	-
	- 0	-	-	-	-
	- 0	-	-	-	-
	- 0	-	-	-	-
Sub total (Gross income for AR)	79,131	-	-	79,131	92,157
A2 Asset and investment sales, (see table).					
	- 0	- 0	- 0	-	
	- 0	- 0	- 0	-	- 0
Sub total	- 0	- 0	- 0	-	- 0
Total receipts	79,131	- 0	- 0	79,131	92,157
A3 Payments					
HOUSEHOLD & UTILITIES	10,914	-	-	10,914	7,903
PROPERTY MAINTENANCE	2,120	-	-	2,120	2,815

INSURANCE	797	-	-	797						
SURVEYS	11,277	-	-	11,277	3,215					
SOLICITOR FEES	2,444	-	-	2,444	3,000					
TRAVEL	1,566	-	-	1,566	1,650					
VISA FEES	9,696	-	-	9,696	-					
ICFS	906	-	-	906	950					
	- 0	-	-	-	-					
Sub total	39,720	-	-	39,720	19,533					
A4 Asset and investment purchases, (see table)										
	- 0	- 0	- 0	-						
	- 0	- 0	- 0	-						
Sub total	- 0	- 0	- 0	-	- 0					
Total payments	39,720	- 0	- 0	39,720	19,533					
Net of receipts/(payments)	39,411	-	-	39,411	72,624					
A5 Transfers between funds	- 0	-	-	-	-					
A6 Cash funds last year end	- 0	-	-	76,142	3,518					
Cash funds this year end	39,411	-	-	115,553	76,142					
Section B Statement of assets and liabilities at the end of the period										
Categories	Details	Unrestricted funds	Restricted funds	Endowment funds						
		to nearest £	to nearest £							
B1 Cash funds	CASH AT BANK	115,553	-							
		-	-							
		-	-							
	Total cash funds	115,553	-							

	(agree balances with receipts and payments account(s))	Agreement	OK	OK					
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £					
	Details								
B2 Other monetary assets		-	-	-					
		-	-	-					
		-	-	-					
		-	-	-					
		-	-	-					
		-	-	-					
	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)					
B3 Investment assets			-	-					
			-	-					
			-	-					
			-	-					
			-	-					
	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)					
B4 Assets retained for the charity's own use			-	-					
			-	-					
			-	-					
			-	-					
			-	-					
			-	-					
			-	-					
			-	-					

			-	-					
	Details	Fund to which liability relates	Amount due (optional)	When due (optional)					
B5 Liabilities			-						
			-						
			-						
			-						
			-						
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name		Date of approval					
		Mariæ Ogdën		17 Dec 2024					

[illegible]

[illegible]



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name

FRIENDS OF THE IMMACULATE HEART SISTERS

On accounts for the year
ended

31st DECEMBER 2023

Charity no
(if any)

1194081

Set out on pages

1

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended. 31 / 12 / 2023

Responsibilities and
basis of report

As the charity trustees of the Trust, you 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 the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

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:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

** Please delete the words in the brackets if they do not apply.*

Signed: A J POLLOCK

Date: 22 / 11 / 2024

Name: ANDREW JOHN POLLOCK

Relevant professional
qualification(s) or body
(if any):

FELLOW OF THE INSTITUTE OF CHARTED ACCOUNTANTS

Address:	53 Penerley Road, Catford
	London
	SE6 2LHa

Section B**Disclosure**

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From **1st January 2023** Period start date To
Period end date. **31st December 2023**

Charity name: **Friends Of The Immaculate Heart Sisters CIO**

Charity registration number: **1194081**

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	Furthering the Roman Catholic faith for the public benefit, through direct support of the Roman. Catholic Association of consecrated women known as the Franciscan family of the Immaculate Heart and of St Maximilian. Providing resources such as accommodation, sustenance, training, and development to this Association, and also supporting other activities that further the Roman Catholic faith.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	*
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees confirm that they have considered The Charity Commission's General Guidance on public benefit and in particular the supplementary of religion for the public benefit

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	

Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	The Sisters provide for the Liturgical and Pastoral care for over 200 lay people, who attend The Holy Mass in the Chapel of their convent, which is open to the public.

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	N / A
Performance of fundraising activities against objectives set	Para 1.41	N / A

Investment performance against objectives	Para 1.41	N / A
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Friends Of The Immaculate Heart Sisters is in a good financial position going into the new financial year.
1xddw2dsw	Z`M N,D ≥M LK/	Reserves will be held to ensure The Roman Catholic faith continues to be promoted
Amount of reserves held	Para 1.22	£115,553
Reasons for holding zero reserves	Para 1.22	N / A
Details of fund materially in deficit	Para 1.24	N / A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	N / A

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Grants, Donations and Gifts
Investment policy and objectives including any social investment policy adopted	Para 1.46	N / A
A description of the principal risks facing the charity	Para 1.46	N / A
Other		

Structure, Governance and Management

Description of charity's trusts:		None
Type of governing document (trust deed, royal charter)	Para 1.25	Trust Deed
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO – Foundation Registered (Date)
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Appointment by Chair and Trustees

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	N / A
The charity's organisational structure and any wider network with which the charity works	Para 1.51	N / A
Relationship with any related parties	Para 1.51	N / A
Other		

Reference and Administrative details

Charity name	FRIENDS OF THE IMMACULATE HEART SISTERS CIO
Other name the charity uses	
Registered charity number	1194081

Charity's principal address	8 Ashbury Lane Sheffield S8 8LF

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Tim Craggs	Chair		
3	Maria Ogden	Trustee		
4	Sara Buscombe	Trustee		
5	Beth Craggs	Trustee		
2	James Bogle	Trustee		
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

[illegible]

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	None
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N / A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N / A

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
-----------------	------	---------

Name of chief executive or names of senior staff members (Optional information)

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

--

Other optional information

--

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

T Craggs



Full name(s)

Timothy David Craggs

Position (eg
Secretary, Chair, etc)

Chair

Date

2nd December 2024

FRIENDS OF THE IMMACULATE HEART SISTERS

England & Wales - Charity number 1194081

Accounts

Friends of the Immaculate Heart Sisters, CIO

Charity registration number 1194081

Contact address: Tim Craggs (Chair of Trustees), 8 Ashbury Lane, Sheffield, S8 8LF

Contact email: friendsoftheimmaculateheart@gmail.com

Other trustees: James Bogle, Maria Ogden, Sara Buscombe, Beth Craggs

Charitable aims

Furthering the Roman Catholic faith for the public benefit, through direct support of the Roman Catholic Association of consecrated women known as the Franciscan Family of the Immaculate Heart and of St Maximilian. Providing resources such as accommodation, sustenance, training, and development to this association, and also supporting other activities that further the Roman Catholic faith.

Summary of activities from 1 January 2022 - 31 December 2022

In the year 2022, the community of religious sisters that the charity supports increased in size, to 22 members. The increased community meant that they needed a larger convent to accommodate everyone, and for this reason they moved to Scotland. They began approaching donors to raise the funds needed to purchase a convent and chapel for themselves, and this year raised a significant sum towards the purchase price and associated fees.

The Charity supported the sisters accordingly, providing money:

- for the moving costs
- for buying furniture for the house and religious items for their chapel
- for paying utility and other bills

The Charity also paid for all the travel expenses of the sisters due to their apostolate and their needs, and the insurance for their vehicles.

The Charity also supported the sisters in paying Visa fees and medical expenses where needed.

The sisters provide for the liturgical and pastoral care of about 200 lay people, who attend the Holy Mass in the chapel of their convent, which is open to the public. The Charity helps the sisters by financially supporting their apostolate.

Furthermore, the Charity helped the sisters in their apostolate by paying for the printing of religious booklets and pamphlets.

Governance

The trustees meet a minimum of four times per year to ensure that they are all apprised of the current state of the charity, the needs it is meeting and any additional funds -or other resources - required to do so. New trustees - either to grow the trustee board or to replace resigning trustees - are recommended to the board by the sisters themselves. The trustees then assess their suitability as trustees and vote to confirm whether they will be appointed. Two additional trustees were voted onto the board of the Charity in 2022: James Bogle, and Sanam Ogden. This brings the total number of trustees to five.

Sources of income

Donations were made by individual supporters, largely from within the USA. Total donations in this period equalled £88,638.53 (for a more detailed breakdown see the summary of accounts). The reason for this significant increase is to raise enough funds to purchase a dedicated convent and chapel for the sisters in the very near future.

Expenditure

Total expenditure equalled £19,533.77.

Future plans

The Charity will continue to support the sisters' daily needs, paying essential bills, Visa fees, travel etc, as well as continuing to raise funds to purchase a larger convent so that the community can continue to grow. At the end of 2022 it was hoped that the purchase would be completed within the following year (2023).



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
FRIENDS OF THE IMMACULATE HEART SISTERS

On accounts for the year
ended

31st DECEMBER 2022

Charity no
(if any)

1194081

Set out on pages

1

1 & 2 (remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2022

Responsibilities and
basis of report

As the charity trustees of the Trust, you 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 the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention (~~other than that disclosed below *~~) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

** Please delete the words in the brackets if they do not apply.*

Signed: A J POLLOCK

Date: 22 / 12 / 2023

Name: ANDREW JOHN POLLOCK

Relevant professional
qualification(s) or body
(if any):

FELLOW OF THE INSTITUTE OF CHARTED ACCOUNTANTS

Address:

53 Penerley Road, Catford

London

SE6 2LH

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name

FRIENDS OF THE IMMACULATE HEART
SISTERS

No (if any)

1194081

CC16a

Receipts and payments accounts

For the period
from

Period start
1/1/22

To

Period end
12/31/22

Section A Receipts and
payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Grants and Donations	92,157	-	-	92,157	6,227
	- 0	-	-	-	-
	- 0	-	-	-	-
	- 0	-	-	-	-
	- 0	-	-	-	-
	- 0	-	-	-	-
	- 0	-	-	-	-
Sub total (Gross income for AR)	92,157	-	-	92,157	6,227
A2 Asset and investment sales, (see table).					
	- 0	- 0	- 0	-	-
	- 0	- 0	- 0	-	- 0
Sub total	- 0	- 0	- 0	-	- 0
Total receipts	92,157	- 0	- 0	92,157	6,227
A3 Payments					
Travel	3,346	-	-	3,346	1,872
Insurance	4,557	-	-	4,557	-
Surveys	3,000	-	-	3,000	-
Visa Fees	2,815	-	-	2,815	-
Printing	1,650	-	-	1,650	-
Sundry	950	-	-	950	837
Household Utilities	3,215	-	-	3,215	-
	- 0	-	-	-	-
	- 0	-	-	-	-
Sub total	19,533	-	-	19,533	2,709
A4 Asset and investment purchases, (see table)					
	- 0	- 0	- 0	-	-
	- 0	- 0	- 0	-	- 0
Sub total	- 0	- 0	- 0	-	- 0
Total payments	19,533	- 0	- 0	19,533	2,709
Net of receipts/(payments)	72,624	-	-	72,624	3,518
A5 Transfers between funds	- 0	-	-	-	-
A6 Cash funds last year end	3,518	-	-	3,518	-
Cash funds this year end	76,142	-	-	76,142	3,518

Section B Statement of
assets and liabilities at the
end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	CASH AT BANK	76,142	-	-
		-	-	-
		-	-	-
	Total cash funds	76,142	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-

		-	-	-					
		-	-	-					
		-	-	-					
		-	-	-					
		-	-	-					
		Fund to which asset belongs	Cost (optional)	Current value (optional)					
B3 Investment assets	Details		-	-					
			-	-					
			-	-					
			-	-					
			-	-					
		Fund to which asset belongs	Cost (optional)	Current value (optional)					
B4 Assets retained for the charity's own use	Details		-	-					
			-	-					
			-	-					
			-	-					
			-	-					
			-	-					
			-	-					
			-	-					
		Fund to which liability relates	Amount due (optional)	When due (optional)					
B5 Liabilities	Details		-						
			-						
			-						
			-						
			-						
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval						
		Maria Ogden	2/2/24						
		Beth Craggs	2/2/24						

FRIENDS OF THE IMMACULATE HEART SISTERS

England & Wales - Charity number 1194081

Accounts

Friends of the Immaculate Heart Sisters, CIO

Charity registration number 1194081

Charitable aims

Furthering the Roman Catholic faith for the public benefit, through direct support of the Roman Catholic Association of consecrated women known as the Franciscan Family of the Immaculate Heart and of St Maximilian. Providing resources such as accommodation, sustenance, training, and development to this association, and also supporting other activities that further the Roman Catholic faith.

Summary of activities from incorporation (April 2021) - year end (December 2021)

This was a fruitful beginning for the Charity in which it managed to coordinate with the Immaculate Heart Sisters, to give financial support where it was needed, for the continuance of their charitable work.

Sources of income

Donations were made by individual supporters, largely from within the UK. Total donations in this period equalled £6228 (see next page for a summary of accounts).

Expenditure

During this period the Charity provided tickets for travel which enabled sisters to maintain their work in the Channel Islands, and to reach other places where they were needed. The Charity also covered some costs for a Visa for a foreign sister, to enable her to serve in the UK and the Channel Islands, and covered some medical costs to support the health of some sisters. In addition, the Charity provided fabric with which the sisters were able to make clothing. Total expenditure equalled £2709.

Future plans

It is hoped that the Charity can continue with this kind of support, and that with this help the Sisters will continue their very successful work. It is also envisaged, however, that the Charity may in the near future become involved in a project to find a larger property for the Sisters to use, since one of the properties they currently use is not of a sufficient size for the number of Sisters, especially as they are receiving new members.

ANNUAL ACCOUNTS OF THE CHARITY
Friends of the Immaculate Heart Sisters
from 13-4-2021 to 31-12-2021

DESCRIPTION	INCOME	EXPENDITURE
Donations	£6,227	
Travel Costs		£1,872.24
Expenses for Visa and Documents sisters		£481.36
Fabric		£207.50
Medical Expenses		£148
 TOTAL INCOME	 £6,227.85	
TOTAL EXPENDITURES		£2,709.10
 CLOSING BALANCE	 £3,518.75	