

A faith that *does* justice

JESUITS



ANNUAL REPORT
2020–2021

Jesuits in Britain

MISSIONS & AIMS

The Jesuits (the Society of Jesus) are an international Catholic order of priests and brothers. Dating back to 1540, the Society was founded by St Ignatius of Loyola, and has since grown to work in more than 100 countries.

Motivated by faith, increasingly the work of the Jesuits focuses on accompanying young people and those who live on the margins of society.

The British Province is active in schools, universities, retreat and spirituality centres, and local parishes, and through both local outreach and the provision of dedicated charities, works directly with the homeless, refugees, and those in the Developing world.

116

JESUITS

8

COMMUNITIES

369

STAFF MEMBERS

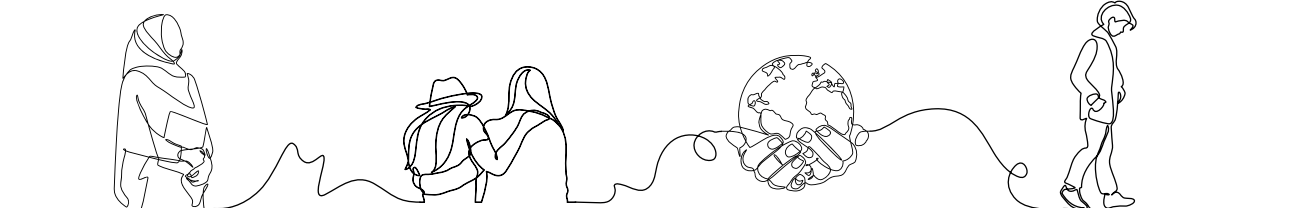
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UNIVERSITY
CHAPLAINCIES

11

SCHOOLS

ENCAPSULATED IN THE FOUR UNIVERSAL APOSTOLIC PREFERENCES:



PROMOTE

discernment and the spiritual exercises of St Ignatius

WALK

with the excluded

CARE

for our common home, the planet

JOURNEY

with young people

THE JESUITS CARRY OUT THIS WORK IN SEVERAL WAYS:



EDUCATION through primary and secondary schools, both fee-paying and voluntary-aided, and an Oxford college.

INTERNATIONAL WORK funding projects in the Developing world through Jesuit Missions, and missioning men.

SPIRITUALITY organising physical and online retreats, and offering spiritual direction and support to individuals in spirituality centres, chaplaincies and parishes.

SOCIAL JUSTICE accompanying the marginalised, and through the Jesuit Refugee Service, those who are forced to navigate the UK's asylum system.

FORMATION of priests, religious and lay people.

CARE of elderly and infirm members.

PARISH MINISTRY rooted in parish communities and university chaplaincies.





From Fr Provincial

It was only back in 2016 that the Jesuits held their last general Congregation in Rome, yet it seems like a different world when I look back at it. Alone of all the 22 plus delegates from every corner of the globe, the three of us from the British Province sensed that “something was up” having lived through the turbulent months which followed the Brexit vote. “What’s going on in your country?” people would ask with knowing smiles.

That all changed on the morning of Wednesday 9th November, the day after the US presidential election. Against all predictions, Donald Trump had been elected to the most powerful job in the world and the American Jesuits were stunned. What was this new wave of populism sweeping through the world all about? Jesuits are not usually short of an opinion or two but for once none of us had anything terribly insightful to offer.

The rest of the proceedings of the Congregation reflected that reticence about pronouncing on the needs of the world and of the Church. Pope Francis gave us a memorable, indeed, historic address. Our new General, Fr Arturo Sosa, took his first steps as leader

“We are living through a protracted emergency in which the watchwords are flexibility and adaptability.”

of the order. We drafted some texts, made some decisions and headed for home knowing that the ground was shifting under our feet and we couldn’t quite understand why.

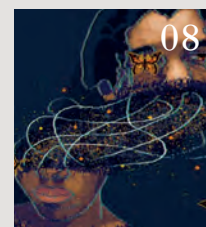
Here in 2022 we are probably roughly halfway towards our next Congregation. The pace of change

and its intensity has been unrelenting. More political earthquakes. Signs of impending environmental catastrophe. A worldwide pandemic. And now as I write, a major war of aggression on European soil is unfolding. People have given up saying what strange times we are living in and expecting a return to normality. Instead we seem condemned to lurch from crisis to crisis.

In six years we have come a long way in our understanding of “what’s going on”. Pope Francis has been a prophetic voice ever since his election back in 2013. He is the one who spoke of a piecemeal “third world war” which is beginning to look less piecemeal by the day. He wrote his encyclical, *Laudato Si’* (2015) as a plea to the world to wake up to the environmental crisis in all its aspects and to change at a deep level the way we organise our societies and our lives. And more recently, he has called in *Fratelli Tutti* (2020) for the promotion

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of a culture of fraternity and social friendship at a time when violent polemic and casual contempt have become the norm in the public domain.

This is the backdrop of this year's annual report. It's not a time to trumpet achievements or to speak glibly of great visions and plans. We are living through a protracted emergency in which the watchwords are flexibility and adaptability. The Jesuits in Britain seek to respond as generously as we can to the many needs emerging in the Church and in the world, always doing that in partnership with others within and outside the Church.

The articles in this report give a good idea of some of those responses. The *Laudato Si'* Research Institute is now getting well into its stride as it helps the Church think through how our Catholic faith shapes our response to the environmental crisis. Jesuit Missions and JRS UK report on their superb efforts to serve their respective constituencies. The establishment of a new Jesuit community in Newcastle at such a challenging time is a potent sign of our commitment to help people to find God by accompanying them on their spiritual journey. All these activities

and the others recounted in these pages are part of a comprehensive and multi-dimensional mission which the Jesuits understand as God's own way of breathing new life into the world.

But there are also plenty of initiatives which you won't find quite so prominently displayed.

A major contribution to the life of the Church in 2021 was Jesuit support for the establishment of new safeguarding structures, especially for the members of religious orders. A Jesuit with extensive experience in this safeguarding and organisation development, Fr David Smolira SJ, was seconded to the Conference of Religious for nine months to set up the Religious Life Safeguarding Service which will support religious all over the country in fulfilling the standards required in safeguarding by the new Catholic Safeguarding Standards Agency. The Jesuits also made substantial financial contributions to enable poorer religious congregations to avail themselves of those services.

The London Jesuit Centre launched its programme during the year, even in the face of multiple lockdowns, and set about building up a clientele not only

from the British capital but all over the world. Its ground-breaking combination of Ignatian spirituality, theology and social and ecological justice has started to inspire a new generation to follow Christ and to apply His teachings to the concrete situations in which they live, bringing their faith to life.

In Scotland two entrepreneurial Jesuits used the new opportunities presented by Zoom to reach out to a new public. Father David Birchall SJ at the Ignatian Spirituality Centre in Glasgow garnered the admiration even of Fr General for his worldwide reach in offering Ignatian retreats online, while Brother Ken Vance SJ took the Edinburgh Jesuit Centre to new heights with online talks from leading Catholic figures, including high-ranking Vatican officials.

As I write this, several days into the Russian invasion of Ukraine, wondering what the world will look like by the end of the week, let alone the decade, I know how much we owe to our many supporters and friends who have made it possible to for us to offer our lives for the service of Christ's mission. If we are to move forward with all the flexibility and creativity called for at this astonishing time it is because of their generosity and sacrifice. Thank you! ●

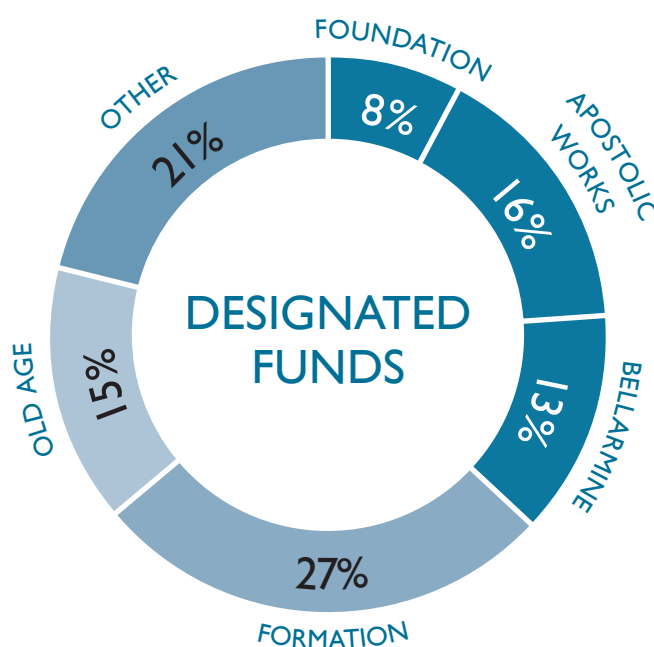


Fr Damian Howard SJ

“As we respond to the ever-changing needs of the Church and wider society in the UK, our various Works are seeking supporters to help fund our ambitious apostolic aims.”

FR KEITH MCMILLAN SJ

WHY DO THE JESUIT WORKS SEEK *donations?*



Our annual accounts show that we are relatively fiscally healthy with the available funds for the broadest of our activities (designated funds) having a year-end total value of £670million. These assets represent generations of precious donations and legacies bequeathed to the Jesuits for us to maintain as an ongoing sustainable resource to support specific purposes around the Province and beyond.

Two of the largest funds are exclusively reserved for the training of Jesuits both here and abroad (Formation Fund) and the care of the increasing number of older Jesuits in the Province as they become infirm (Old Age Fund).

Three other funds with a total value of £247 million (making up 37% of our designated funds) are available for direct and indirect ministry: the Foundation Fund (for new initiatives as well as external grants), the Apostolic Works Fund and its associated fund, the Bellarmine Fund.

The following pages illustrate some of the activities that have benefited from these funds across various ministries. Our general policy has been to limit our use of funds to 3% of the total in order to maintain the integrity of these funds over the long term. This current year, just over 2.6% of their beginning investment balance has been used for direct or indirect

ministry. We have been cautious about using more since we feel that the current fund valuations may be high and due for market corrections. Generally though, we expect that we will draw more than 3% in future years due to both the ever-growing needs of our Works and the falling number of actively working Jesuits in the Province.

As we respond to the ever-changing needs of the Church and wider society in the UK, our various Works are seeking supporters to help fund our ambitious apostolic aims. Please see Note 19 in the annual accounts for a more detailed explanation of our designated funds. ●



Knowing Jesus

– A RETREAT FOR LENT

Fr David Birchall SJ reflects on the growing success of a 'virtual' Lent retreat.

For the last four years the Ignatian Spirituality Centre (ISC) in Glasgow has been offering an online Lent retreat. The basic idea came from the Dutch Jesuits. For each day of Lent a short passage of Scripture is provided, along with an illustration and a daily reflection. The suggestion was made that people should try to spend time each day in Lent praying with the Scripture or the artwork. What was very special about the retreat was the forming of groups of people, initially in person in Scotland, to meet weekly for a presentation on a way of praying and also to share the fruit of the week's prayer with the retreat. Most groups were facilitated by a person who had attended the courses in Ignatian Spirituality at the ISC.

In the first year five hundred people logged on to the website daily to follow the retreat. About half of the participants met in groups each week. Initially the Scripture was taken from the Eucharist of the day. The second year of the retreat took 'Walking together with Jesus' as the theme, while for the third year we led people through the Spiritual Exercises of St Ignatius Loyola. Finally for 2021 we took the person of Jesus as the theme, examining subjects such as his emotions, his friends, his prayer and actions.

BBC Radio 4 became aware of the retreat and decided to use its Scripture and themes to help focus their Morning Service almost every day in Lent. They also linked to our retreat on the BBC website. Although the retreat was still produced by the ISC in Glasgow, 2021 saw much greater collaboration with other parts of the British Province. The number of groups that we knew

of grew to over 75, and the number of participants reached 5,000 every day; in total over 130,000 people became involved.

In 2018 and 2019 we published the retreat material in book form as some parish group leaders pointed out that many, particularly the elderly, couldn't readily access online material. But, with COVID-19 restrictions in place in 2021, we decided not to repeat that. Instead another friend helped us to create apps, for Apple and Android devices. These brought another couple of thousand daily participants. An extra addition for 2021 was a daily video of inspirational music courtesy of YouTube links.

The number of groups that we knew of grew to over 75, and the number of participants reached 5,000 every day

Well over 300 people took the time to get in touch with us at the end of the retreat to say how it had gone for them. Many described how it had deepened their Lent experience with comments such as:

"It has been my first real prayerful Lent ever in my life. I prayed with the texts every day and got so much from the resources you sent."

The topic of the person of Jesus was intended to help participants get in touch with the humanity of Jesus and open up to the possibility of real communication with Christ in prayer.

For many it did just that:

"It has deepened my relationship with Jesus. I feel so much closer to Him and have seen different sides of his character." **Louise**

"The retreat encouraged me to think more deeply about my faith and taught me to slow down and reflect more on what is really important." **Mary**

"Jesus became more human to me, more tender, more like a young man, happier, more likeable." **Christine**

"Made me appreciate Scripture more in my daily life and in dealing with others. It also made me more aware of my many blessings." **Dolina**

"I have learnt so much especially about meditation and I am still learning. It has been a fantastic fruitful experience. I can certainly feel the benefits of your Lent Retreat. I cannot thank you enough." **Belinda**

"I met both Jesus and myself and am amazed at the difference between his authority and that of the political folks around at that time. Know whose way I want to follow." **Sue**

The majority of those who attended groups were very positive about their experience:

"It was very special to share Lent with a group of committed Christians. Especially during lockdown, the sense of sharing the same faith journey was quite profound."

"The structure facilitated taking time to listen, and the lovely, wise group with excellent leadership was a great support."

Although a few individuals wanted less material to choose from, and the odd one a little more, most found the music, picture, Scripture and reflection mix about right and were able to choose what helped them:

"Much of the artwork and the music helped to bring the Scripture passages to life"

"The artwork put 'skin' on the Gospel characters." **Christine**

"I looked forward each day to the magnificent artwork, so vibrant, colourful and thought-provoking. The variety in music was also a great delight." **John**

Well over 300 people took the time to get in touch with us at the end of the retreat to say how it had gone for them.

Many too talked of learning new ways of praying or taking on a discipline of prayer which they intended to keep up with:

"It gave me a chance to pause and reflect each day; I was also able to engage more deeply with the Gospels – a Lenten discipline which I now want to continue." **Matthew**

For a modest Jesuit-run Spirituality centre in Glasgow, which normally

tends to deal in small numbers of people, to reach out to thousands of people around the globe as well as to the more distant parts of Scotland, has been a great and consoling experience.

With the 500-year anniversary of the conversion of St Ignatius Loyola we shall be offering another Lent retreat on the life of St Ignatius for Lent 2022. We hope we can maintain the momentum of the last few years. ●



The Ignatian Cannonball

THAT REVERBERATED DOWN THE CENTURIES

One of Wimbledon College's English teachers **Mark Simpson** reflects on how his school community bounced back from the pandemic.

May 20th 2021 marked the 500th anniversary of the fateful collision between St Ignatius and that cannonball in the Spanish city of Pamplona. In a challenging academic year, which brought personal suffering and loss to many within and outside the Wimbledon College community, Ignatius's 'cannonball moment' seemed a fitting reminder that even from the depths of despair can come light, renewed faith, and the promise of recovery, finding God in all things.

A reminder to be always looking to the future, whilst remembering the past, came at the end of the academic year, in the leaving speech of College History teacher, Mr Mark Ventom. In some 37 years of school service, Mark consistently embodied the Jesuit values that we hold true to as a school. As well as being an inspiration in the classroom, he was a true 'man for others' in his dealings with pupils and colleagues alike. Mark spoke of the teacher's role as simply 'passing on the baton of knowledge' to the next generation.

One of those to whom Mark passed that baton was Old Wimbledonian, Jeffrey Boakye: an author, broadcaster and educator who has a particular interest in race, masculinity and popular

"Our sixth form sleep-out could go ahead as the lockdown eased in June."

culture. Jeffrey delivered a memorable and eye-opening staff training seminar as part of the College's response to global issues arising from the Black Lives Matter movement and the Sarah Everard murder.

Such engagement with the wider world is a central part of the vision of all Jesuit schools, helping pupils to see the realities of contemporary society. We were delighted, therefore, that our sixth form sleep-out could go ahead as the lockdown eased in June. On the sleep-out night, boys are educated through a combination of talks and films

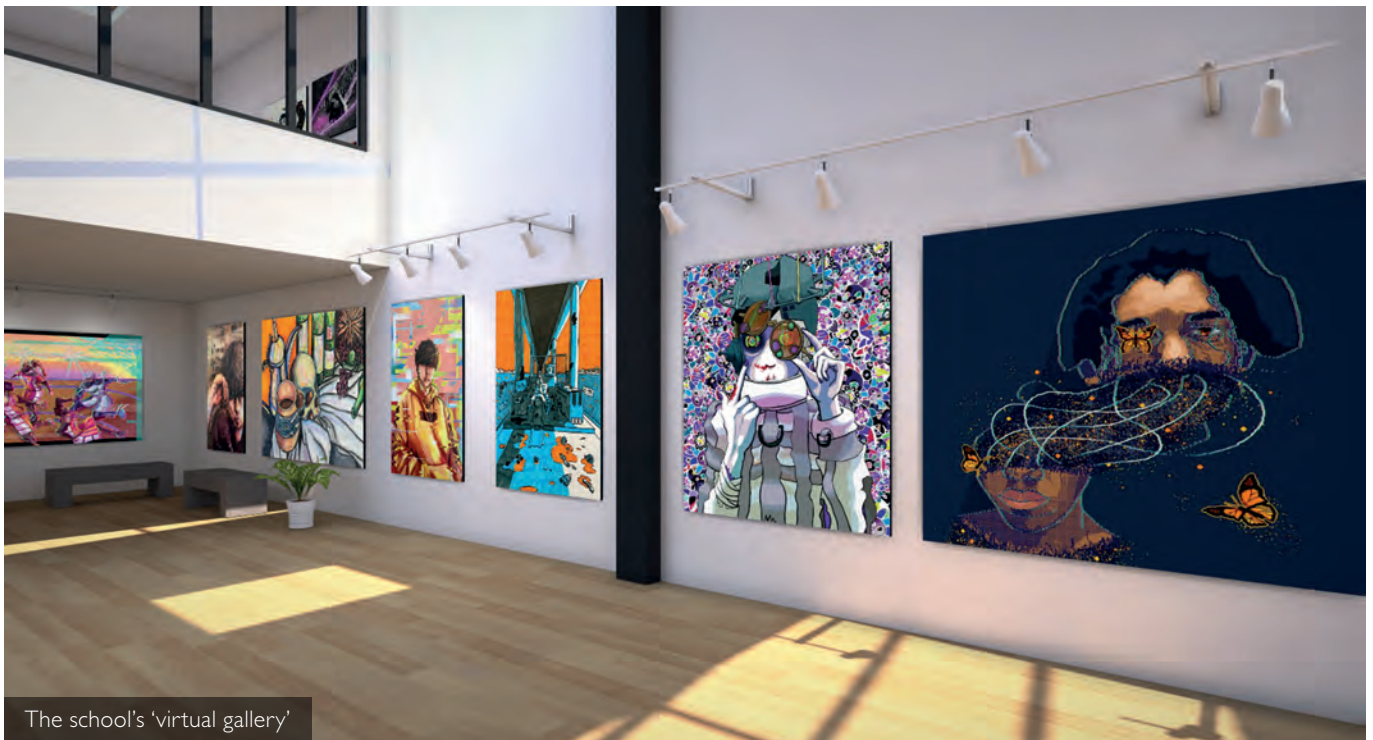
about the complexities and challenges of homelessness, before sleeping rough themselves in the various doorways and playgrounds of the College. Those who take part are wise enough to know the experience gives them a mere glimpse of the real hardships of street-living, but it is a beginning, as they come to a greater sense of all that they can be grateful for.

Encouraging excellence and developing talents are another cornerstone of our school vision, and the school sports hall and playing fields are an excellent place to see this in action. In the general COVID-enforced absence of rugby and football, our athletics programme, spearheaded by Mr Soalla-Bell, enjoyed the limelight. We celebrated significant individual achievements by Conor Kelly, Elliott Turbin, Thomas Greenwood and others in a range of events, while team success was had by various years in cross-country running. Year 12 pupil Isaac O'Connell, took centre stage, or rather, centre court, being selected to ball-boy the Men's Final of Wimbledon 2021, after impressing as a ball-boy team captain throughout the championships. And, staying with the outdoors, Year 10 boys undertook their Duke of Edinburgh expeditions, developing skills of teamwork, organisation and self-sufficiency.



Sixth formers take part in a sleep-out





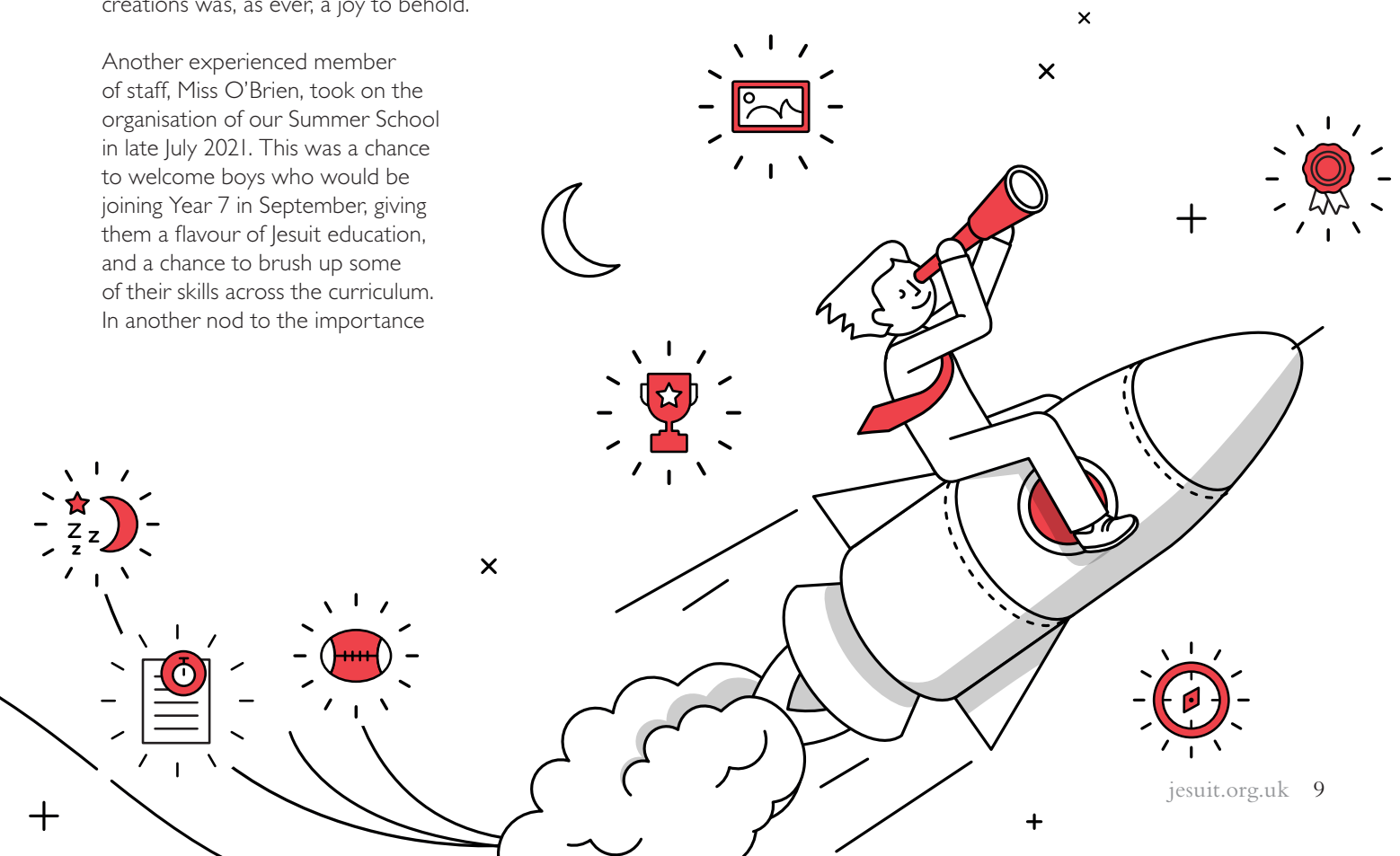
The school's 'virtual gallery'

Elsewhere, despite some of the general frustrations of online teaching, we embraced the virtual world with great success. Mr England, Head of Art, organised the annual Art and Photography exhibition online, creating an ingenious virtual gallery complete with pillars and stairs, around which an array of artwork was displayed from boys in the upper school. The vibrancy and originality of expression in these creations was, as ever, a joy to behold.

Another experienced member of staff, Miss O'Brien, took on the organisation of our Summer School in late July 2021. This was a chance to welcome boys who would be joining Year 7 in September, giving them a flavour of Jesuit education, and a chance to brush up some of their skills across the curriculum. In another nod to the importance

of connecting our past to our future, boys were split into four groups named after school alumni: Jeffrey Boakye (mentioned above), actor Tom Holland, England Rugby coach Ben Ryan, and Paralympian Toby Gold. No doubt through emulating their examples of hard work and commitment, our soon-to-be Year 7 pupils will themselves find that niche of life in which we as a school can help them to excel.

As the academic year 2020-2021 drew to a close, Conor Kelly was selected to represent England in the 'SIAB Schools Indoor International Pentathlon', where he came third overall. This was one final reminder of that central Jesuit belief in the all-round development of the individual, and that what happens in the exam hall is only one element of what we pride ourselves on here at Wimbledon College. ●



Vaccinating

THE VULNERABLE

For many of the refugees served by the Jesuit Refugee Service (JRS) UK, access to healthcare is fraught with difficulty.

Rhiannon Prideaux explains how and why JRS UK hosted pop-up COVID-19 vaccine clinics for refugee friends over the past year, and how new partnerships were developed.

When the news broke in December 2020 that the Pfizer-BioNTech vaccine had proven effective in protecting people from COVID-19, it felt as if the whole world breathed a sigh of relief. Finally, it seemed there was a light at the end of the tunnel and a hope of returning to some form of normality.

We were so excited at the thought of being able to return to face-to-face services, but worried about the type of barriers that around 350 refugee friends supported by JRS would face in accessing the vaccine. The JRS team began speaking with each of our refugee friends in turn, beginning with those

most vulnerable to COVID-19, to check that they were registered with a GP and felt happy about getting the vaccine.

Easing doubts & countering misinformation

From many conversations with refugee friends over several weeks, it became clear that some people were anxious about accepting the vaccine. They felt that they didn't know enough about how it had been made and were worried it could be dangerous for them. With a great deal of misinformation being shared, we knew we needed to offer refugee friends a safe space where they could ask questions about the vaccine and COVID-19 in general.

We hosted several Zoom Q&A workshops with medical professionals.

Over six Zoom sessions, in four different languages, Fr Dr Paul O'Reilly SJ, Dr Sara, and Dr Dominique volunteered their time to meet with JRS refugee friends and staff to discuss the vaccine and answer any questions people had. It was a very fruitful process with some refugee friends attending several sessions, each time learning more about the vaccine and about COVID-19. Their doubts were eased, and they were able to make an informed choice about whether to be vaccinated.

A new and lasting partnership

The next barrier was ensuring refugee friends were able to access the vaccine. Many find it difficult to even register with a GP, meaning securing healthcare can be a real challenge. We partnered with the outreach team at Barts' NHS Health Trust and the Excel vaccination centre to host a vaccination clinic at our



centre in Wapping. The partnership offered an opportunity for refugee friends to have the vaccine in a place they felt safe, alongside people they knew. At the same time as having their vaccination, refugee friends came to JRS for a face-to-face casework or legal advice appointment and could take home some toiletries and hot food.

“Many refugee friends find it difficult to even register with a GP, meaning securing healthcare can be a real challenge.”

We were eventually able to vaccinate 92 refugee friends at our clinics – from first doses, right through to booster doses. It was so good to see people in person again and support them in getting this vital protection against COVID-19. One refugee friend said, *“I would like to thank JRS for my vaccination. No side effects yet. You have treated us all the best way.”*

We are continuing to work in partnership with Barts' NHS Health Trust to remove barriers to healthcare for refugee friends, and other people on the peripheries of society, to reduce health inequalities.

Sharing good practice

Our refugee friends are not the only people who struggle to access healthcare; many of those who live on the margins of society face the same challenge. For some it's about language barriers, for others it is about a deep distrust of institutions; often it's a combination of many factors.

We partnered with a local Filipino community organisation, who were interested in how the JRS pop-up vaccination clinics worked, as many of their members would also have difficulty accessing the COVID-19 vaccine through mainstream routes. We were able to vaccinate 67 of their members with first doses, and then they organised their own clinics, closer to their base in order to administer second doses and support more people in the community.

We can't do it alone

We were blessed to be joined by two Jesuits in formation just as we began the vaccine clinics – first-year novice Mikhael and second-year novice Sam. It was a real joy to get to know Sam and Mikhael, and witness their positive energy, dedication and impact on our work.

When asked about their experience with JRS, Sam said that the vaccination clinics had been one of the highlights for him, alongside delivering essential food and toiletries to refugee friends across Greater London: *“Also when we've been delivering on Fridays to refugee friends. That's been great – those small interactions with people, they last maybe a couple of minutes, but they've just been wonderful. They've been like moments of great consolation for me. It's very small stuff, but it feels like we're able to do something, and give something concrete. I'm just finding there are all these small moments of joy and consolation.”* ●





Heythrop Library — NOT LETTING THE DUST SETTLE

As the Heythrop Library settles into its new home at the London Jesuit Centre, Librarian **Clemens Gresser** reflects on the institution's history – and its future.

When Heythrop College closed in 2018, the future seemed to be to make the Heythrop Library's collection available through Senate House Library at the University of London. What was

undoubtedly clear was the commitment of the Jesuits in Britain not only to retain ownership of over 250,000 volumes, but also to continue providing them as a resource for the academic community as well as the religious. The aim was

wanted materials for supporting teaching at the London Jesuit Centre. One of the challenges in 2021 was the frequent arrivals of books from other Jesuit libraries which had to be given up; this ongoing influx still keeps the library

“The Heythrop Library is the focal point for study and learning by priests, Ignatian Spirituality practitioners and catechists.”

also to keep the collection up to date. The practicalities of achieving this aim cannot be underestimated, but Michael Morgan (Heythrop Librarian until 2019) and Fauziah Iskandar (Assistant Librarian and then Acting Heythrop Librarian until September 2021) rose to the challenge. Firstly, over 100,000 modern volumes were moved to a warehouse in Ruislip (run by an established storage-management company) – this entailed barcoding each volume and adding it to this company’s system. Secondly, another collection of about 100,000 pre-1900 journals and books were sent to the University of London’s offsite store. Thirdly, around 1,500 rare books were earmarked for a new home: the library at Campion Hall (Oxford).

Despite Heythrop College closing, there were PhD students who were still finishing their studies. It was deemed appropriate to have a selection of study texts from the Heythrop Library at Senate House; over 90 books were kept at the Senate House Library building for borrowing only by these Heythrop students. Finally, an idea of setting up a modern working library at the Jesuit’s British base in Mount Street was put into practice, ‘to defray the cost of Senate House Library membership’ (Annual Report 2017–18, p. 7). Fast forward to April 2021, and this working library moved to another space – still within the London Jesuit Centre. The new location is in the basement of the Centre. The reading room of the Heythrop Library continues to provide access to the offsite collections; items from this modern collection, stored in Ruislip (in the region of 140,000 volumes), can be ordered from Mount Street, for borrowing or consulting. The reading room itself has a capacity of about 7,000 books, and includes the most-

staff busy. As of January 2022, only about 3,000 books currently shelved at Mount Street are catalogued.

One remarkable part of what *has* been catalogued in the last couple of months of 2021 is the Ignatian Spirituality Course’s collection. The ISC moved to the London Jesuit Centre in 2019, and the students are regular users of the Heythrop Library’s reading room, and borrowers of materials held at Mount Street.

In a sense the Heythrop Library collections have grown from being a resource used in the training of seminarians (primarily Jesuits – many of whom spent years in exile) to helping shape the education of students at Heythrop College in Oxfordshire and London (who were primarily non-Jesuit men and women).

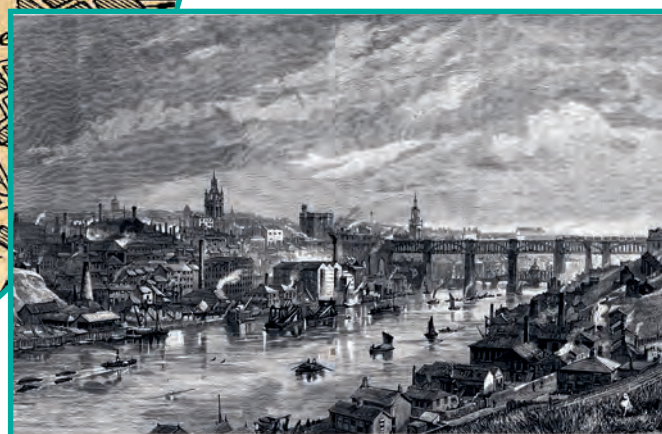
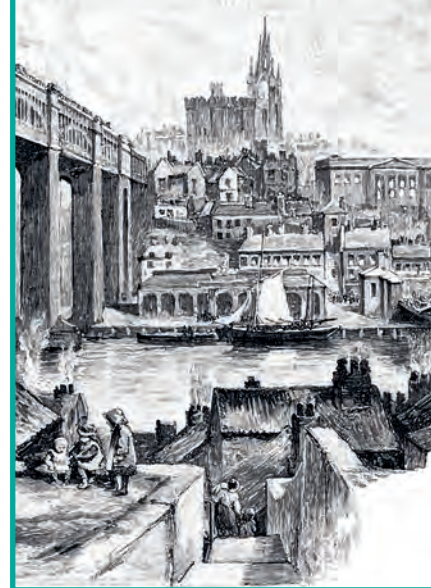
Now, the Heythrop Library is again the focal point for study and learning by priests, Ignatian Spirituality practitioners

and catechists. The consolidation of Jesuit community libraries in London makes the reading room in the London Jesuit Centre’s basement a hub of learning, and a base for the wider Heythrop Library collections. The academic use of the modern collection works well through the tripartite approach to supporting intellectual endeavour in the UK: offering access to books at Mount Street, lending to members at Senate House Library, and offering books to the rest of British academia through the inter-library-loan services of SHL.

Whilst we intend to continue to add new and recent books, primarily in theology and philosophy, in the coming months we will continue to work through the unique and duplicate titles from the now defunct Jesuit community libraries, keeping unique titles either at Mount Street or, if less likely to be in high demand, moving them to the offsite store. Apart from adding new high-level academic materials, the Library will also need to provide finely-tailored support for the teaching of lay people at the London Jesuit Centre (including improving provision for those on the Ignatian Spirituality Course and for catechists of the Westminster Diocese). These aims follow the goals of the Jesuits to support spiritual and educational development in UK society – it is a tall order, and a welcome professional challenge to the Heythrop Librarian. As always in the long period of the ‘English Jesuits’, from their beginnings in these islands, via their persecution and exile in Belgium, to the 21st century, the Jesuits of Britain have adapted to the world around them, and politics and societies have shaped those who live within the Order. All for the aim: to serve the Greater Glory of God, to achieve great works. ●

“These aims follow the goals of the Jesuits to support spiritual and educational development in UK society.”





ABOVE: Antique illustrations and maps of Newcastle

ABOUT *Tyne Too*

Father Dermot Preston SJ recounts the challenges of establishing a new Jesuit community in a city famous for its bridges, but without any sign of a practical bridgehead to narrow the gap in local customs.

St Ignatius hoped that one of the defining characteristics of a Jesuit would be the ability to be mobile and flexible – in body and spirit – and thus able to respond creatively to a new mission. Light cavalry rather than heavy artillery.

In practice, however, one of the great advantages of being moved around as a Jesuit, is that when you are missioned to a strange and unusual place,

there is almost always a Jesuit (or a community) already in that place, and they are able to cushion the shock of the new and give you the *entrée* into all sorts of local customs.

“Never mind which bus goes from A to B... just where the hell are A and B?????”

I have been missioned to work in three different continents, and this parachuting-into-an-established-bridgehead is a wonderful boon. You get quick answers to questions like: Is it safe to go for a walk? Can I drink the tap water? What is the Bishop like? Which dentist should I avoid? Where can I get a cheap hair cut? Which bus do I need to get from A to B? etc...

The new Jesuit mission in Newcastle was totally lacking such a bridgehead. There was no one ahead of us. It was a shock to the system: never mind which bus goes from A to B... just where the hell are A and B?????

We were lucky it was Newcastle and not Ulan Bator. But, best not to panic – just take things one step at a time...

We arrived here in October 2021 following a decision by the British Jesuit Provincial, Fr Damian Howard SJ to accept an invitation from the



JESUITS IN NEWCASTLE

ABOVE: St Dominic's Church and modern Newcastle

Bishop of the Diocese of Hexham to establish a Jesuit community in the Diocese for five years.

In the modern era the Jesuits had a very limited presence in the North-East of England (two small apostolates in Sunderland in the 20th century) so our spiritual forefathers were mostly individual peripatetic Jesuits in the clandestine priestly missions of the 16th and 17th centuries.

The brief for the new Newcastle community was not highly prescribed by the Provincial or the Bishop, which was helpful as it has allowed us to edge our way gently into the local Church and observe where there might be pastoral needs and where we might have skills to augment the gifts already existing there.

There are three of us here: Fr Gero McLoughlin SJ, Fr Peter Randall SJ and myself. We were previously working in Edinburgh, Preston and Glasgow respectively and between us we have

a reasonable amount of experience in parish apostolates, social justice ministry, young adult engagement, ecumenism and spirituality.

“The modern city of Newcastle is finding its feet in the 21st century.”

We are based to the east of the city centre on the arterial road to Byker at the Church of St Dominic's. As the name indicates, the Church was originally built in the 1860s and run by the Dominicans until they withdrew from the city in 2019. St Dominic's was their second incarnation in Newcastle – they first arrived in 1239 and had a thriving presence in the heart of the old city until the dissolution of the monasteries under King Henry VIII.

We live in the old Priory and assist in the sacramental ministry of St Dominic's, and help as part

of the team of six priests running the five churches in central Newcastle.

The modern city of Newcastle is finding its feet in the 21st century. The trade, shipbuilding, heavy industry and mining have disappeared without trace and the certainties, stabilities and social inequalities characteristic of an old northern city of Empire have been replaced by signs of a new ambiguous future. For example, on the day we arrived in the city, it was announced that a Saudi Arabian-backed consortium had bought Newcastle United Football Club. The bottomless cache of petrodollars that will follow will mean that within five years Newcastle will almost certainly be one of the major clubs in Europe – but at what potential moral cost when locals need to turn a blind eye to the dubious actions of an international regime?

It is an interesting time to be around this city: with luck and the grace of God we will all be mutually enriched. ●



The school pays tribute to NHS staff who worked through the pandemic

Ignatius 500

AT ST JOHN'S BEAUMONT

The pandemic gave staff at St John's Beaumont School an opportunity to demonstrate to pupils how Ignatian principles could provide a roadmap to strengthen themselves and their communities, as Headmaster **Giles Delaney** explains.

The image of a young Ignatius lying injured on the ramparts of Pamplona Castle and his ultimate transformation is one that has inspired and intrigued generations of Jesuit students. The Society's celebration of 'Ignatius 500' therefore gave staff, pupils, and parents a valuable opportunity to dig deeper into this story and reflect on what it means for our own lives as individuals but importantly also as a community.

Jesuit schools across the Province are bound together by the story of Ignatius's life and the work of the Society over the centuries and this vision is distilled into the Jesuit Pupil Profile. The JPP is central to the life of St John's Beaumont but as an abstract model, it is our role to demonstrate to our boys the actions that underpin these values. Virtues such as gratitude, generosity, discernment and intentionality are universally recognised as valuable but what do

they look like in reality and how might we evidence these and develop habits in young children?

The global community suffered its own cannonball moment in early 2020 as the threat of COVID-19 emerged and schools particularly found themselves in the front line of the fight against the pandemic. St John's, like every school, was required to continually adapt and develop at tremendous speed to ensure the safety and growth of our pupils. A lodestar was required on which to set our course and the story of Ignatius's injury, recovery and his subsequent influence were just that: they offered a set of values that could strengthen the school community, inspire and encourage our staff and provide direction for our boys.

The JPP contains 16 virtues in total and each of these provided a focus for the community over this time but several spring particularly to mind.

Gratitude and Generosity: the speed at which staff adapted and their determination to place the well-being of boys at the heart of their decisions was hugely important. Their recognition that boys would experience a sense of isolation also made the world of difference but the question was how to harness this isolation and, like Ignatius, use it as a source for growth.

One of the most powerful recollections we have of the past two years was the overwhelming sense of gratitude we received from parents. At such a potentially vulnerable moment, this recognition powered wave after wave of new and adapted initiatives, such as online family dance and sport competitions, cooking lessons, the creation of a giant NHS Rainbow at the front of the school, online orchestra and choir rehearsals and even the filming of the Pre-Prep Nativity 'on location'.

Generosity: Ignatius' vision of recognising the needs of others resonated strongly with our boys and staff. In isolation around the world, our boys were able to come together in small groups or individually to support the needs of their local and national communities. Setting up soup kitchens both single-handedly and with friends in Bangkok, Beijing and Mexico City, creating countless fundraising initiatives, completing triathlons, donating food to Jesuit Missions or simply writing letters of support to individuals, the boys stepped away from their own challenges to recognise and respond to the needs of others.

Discernment and Learning: the boys led their own reflections and learning journeys at times, organising leading research scientists from Oxford University to speak to them about their work on COVID-19 and its likely impact in the future. The older boys wanted to go beyond the science of the virus and consider its wider impact on society and politics.

Active: one of the things the boys told us they missed most was the opportunity to come together as a community at the beginning and end of each week to celebrate Mass and Night Prayer. They were therefore instrumental in setting up the online

Mass programme and were delighted to take responsibility for the planning and delivery of Sung Night Prayer: they even researched into the history of the liturgy of the hours to ensure its authenticity.

Intentional: the concept of intentional actions found fertile soil when our younger boys were moved by the impact of the explosion in Beirut on the pupils of that city's College Notre Dame de Jamhour. They helped to organise a series of assemblies and prayers for those affected as well as associated fundraising events.

“The boys stepped away from their own challenges to recognise and respond to the needs of others.”

Hopeful: the whole community of pupils, staff and parents have been relentless in recognising the importance of optimism throughout the pandemic. This remains at the heart of the St John's ethos of seeing value in every opportunity. This resonated strongly with Ignatius's example of innovation and adaptability in the face of adversity.

Compassionate: perhaps the most striking impact across the school community has been the extent to which compassion has remained even in the most isolating of environments. The boys' ability to accompany and support each other, the staff's ingenuity to work collaboratively and the parents' willingness to play their part and give what they can to support each other have been most overwhelming. A similarity with Ignatius's isolation at Manresa and the space he created to understand himself and his relationship with God, was undoubtedly a source of strength for many at St John's. It is heartening to know that out of this self-reflection a stronger sense of community has undoubtedly emerged. ●

FIND OUT MORE

St John's Beaumont Preparatory School
Priest Hill, Old Windsor,
Berkshire SL4 2JN
www.sjbwindsor.uk



The Nativity, brought to life by pupils

*“Where does all greenness begin? The Trinity
Is spring, source, strength, and return. And how may we
Honour our debt, when debt is so great to pay?
Only by co-creation which tends and attends,
For we are God’s hands and eyes through each green day
Of dog rose and elder, plough-furrowed leaf of the hornbeam”*

EXTRACT FROM SONNET FOR TRINITY SUNDAY BY CAMPION HALL FELLOW, PROFESSOR PETER DAVIDSON,
WRITTEN FOR THE LAUDATO SI’ RESEARCH INSTITUTE CELEBRATION EVENT.



Inspiring change,

INFLUENCING POLICY

Through research and collaboration, the *Laudato Si’* Research Institute is spearheading social-ecological change. Campion Hall’s Communications Officer **Yingying Jiang** assesses its progress so far.

On 23 June 2021, the *Laudato Si’* Research Institute at Campion Hall, University of Oxford, held an event to celebrate the Institute’s progress and achievements since its establishment two years earlier. Attended by guests and speakers from around the world, including the Provincial Superior, Damian Howard SJ, and Pro-Vice Chancellor of the University of Oxford, Professor Jane Shaw, the day marked a significant milestone for the Institute.

In a poem written especially for the day, Professor Peter Davidson framed our responsibilities for tending the natural

world in terms of trinitarian theology, and asked, “And how may we honour our debt, when debt is so great to pay?” This question articulates the frustration many of us feel with respect to the pace of change at a political level. But it also encourages self-reflection, for very often our own actions, choices and behaviours do not correlate with the urgency of the crisis we sense in our innermost being.

Questions like these form the bedrock of the Institute’s vision to promote social-ecological change through research. As LSRI Director Celia Deane-Drummond put it in her

opening address, such a vision “while simple, is ambitious”. Given the highly contested nature of contemporary society, politics, and media, it is clear to see that simply presenting scientific information is not enough to trigger a united, global response. The deeper challenge, therefore, is finding a way to motivate the human will for change and action. And this in turn will require a new way of thinking about human beings, about society, and about our relationship with the natural world around us.

The LSRI has made this the focus of its research mission and has spent the past year strengthening its operational and structural capacity to realise this objective. At the heart of its method is a concern to champion a transdisciplinary approach to research, teaching, and learning within higher education. This helps overcome the

siloi of knowledge, connects research to the world's needs, and inspires dialogue between academics and those invested in social-ecological change. And it resonates with the concerns of many others at this time: as Professor Jane Shaw put it, "the focus of the Institute is absolutely in tune with the University of Oxford's strategy to promote research that seeks to change the world for the better".

It has been exciting to develop this vision in a number of areas over the last year:

Equipping real change in real communities

Co-led by Edward de Quay (Carbon Transition Officer), the LSRI has been a key collaborator on the Guardians of Creation project, an initiative of the Diocese of Salford aimed to help Catholic dioceses in England and Wales reduce their carbon footprint. Last summer, the project published its first report, *Guidance on Developing Strategy for Decarbonising Catholic Diocesan Building Stocks*, which offered practical advice on developing a strategy to reduce the operational emissions of the diocesan building stock. In the autumn of 2021, a second report was published, *Guidance on Catholic Diocesan Carbon Accounting*, providing a step-by-step guide on accounting methods for net-zero carbon for Catholic dioceses.

Influencing policy and practice

The LSRI has been making progress translating the paradigm of integral ecology into practice. In autumn 2021,

the *Listen to Earth Roundtables* series took place as an initiative to facilitate transdisciplinary dialogue between academics, policy makers, and the marginalised to encourage listening and responding to the "cry of the Earth" and the "cry of the poor." The roundtables covered key aspects of the planetary crisis such as climate change, biodiversity, and the water-food-energy nexus, and explored ways to address these with solidarity and nature-inspired solutions. These events brought together participants from diverse backgrounds: marginalised communities and grassroots eco-defenders from Guatemala, El Salvador, and Brazil; policy makers from the Ministry of Food and Agriculture in Ghana, and the United Nations Development Programme (UNDP) in El Salvador; academics from Bangladesh, India, Mauritius, USA and Europe; and practitioners from Costa Rica, Mexico and Spain. Through the ideas generated from these dialogues, the LSRI has started developing a new integral ecology-inspired online magazine called *The Polyhedron Magazine*, which is planned for launch later this year.

The LSRI has been an active participant in networks geared toward ecological conversion such as the *Laudato Si'* Action Platform, the LISTEN Network, and the Ecclesial Networks Alliance (ENA). The Institute has also initiated collaborations and partnerships with key social actors in the ecological policy and practice space, including climate and biodiversity COPs, the World Resources Institute (WRI), Global Witness, and the International Institute



for the Environment and Development (IIED) among others.

Providing resources that might be useful for you

Following a survey conducted in 2020, which examined global access to integral ecology and theology resources, the LSRI has curated the *Laudato Si' Integral Ecology Collection*, which provides open access to a selection of key texts in integral ecology. It is hoped that the collection will provide a valuable resource for lay readers and students, particularly those from lower-income countries. The collection was launched in March 2022 and is now available for all.

Supporting change in academic institutions

Through Campion Hall, the LSRI has been strengthening its collaboration with the University of Oxford. Two of our staff, Tim Howles and Séverine Deneulin, are supporting a funded project to integrate perspectives from the humanities and social sciences into environmental debates that are often led by scientists. The LSRI has offered integral ecology teaching at the Masters level, encouraging geographers to consider the socio-ecological context of conservation and development.

The road ahead for the Institute is a challenging but promising one. Having laid the key foundations to support its vision, the Institute is poised to do meaningful research by means of its unique, transdisciplinary approach and heightened sensitivity to the value and interconnectedness of life on Earth. As Professor Davidson concluded in his poem, "only by co-creation which tends and attends" can we hope to drive societal transformation for the flourishing of our common home. ●



LSRI staff and Father Provincial Damian Howard SJ

OVERCOMING *Poverty and Injustice*

From South Sudan to Madagascar, Jesuit Missions continues to provide practical support for the marginalised – while also demanding action on the causes of poverty and injustice, as **Paul Chitnis** explains.

If anyone embodies the mission of our work – to serve the faith through the promotion of justice and reconciliation – it is Fr Stan Swamy SJ, the 84-year-old Indian Jesuit imprisoned on wholly false charges by the state for his tireless advocacy for the poorest people in India. It put him firmly on the side of the poor and, as a result, squarely in opposition to some powerful forces of repression and exploitation.

His applications for bail on humanitarian grounds were refused, and only when

Fr Stan caught COVID-19 and became desperately sick did the courts release him into the care of a local Catholic hospital where he died. Fr Stan became the 58th Jesuit “martyr” in the last 52 years to have lost his life working for peace and reconciliation.

We were joined by many British Jesuits, including our Provincial, at protests outside the Indian High Commission in London in April, highlighting Fr Swamy’s unjust detention. We also sent over 1,000 cards to Fr Swamy in his prison

cell on his 84th birthday from schools and parishes across Britain. Fr Stan may have been a prisoner of the state but he died a free man. As he wrote: “even a caged bird can sing.”

The communities in Africa and Asia which Jesuit Missions supports are, in so many ways, also trapped by poverty and injustice. The projects we supported last year directly helped 85,000 people in need and three times as many indirectly.

South Sudan is one of the poorest countries on earth where more than 7 million people face food insecurity and 1.4 million children are malnourished. Young people face huge barriers to education and, as always, women and girls are the most affected. The Jesuits





Plumbing class at St Peter's Ecological Training Centre in South Sudan

have responded by establishing St Peter's Ecological Training Centre. It offers vocational courses for young adults in everything from plumbing and construction to beauty and cooking. Twenty students graduated this year and many more are training.

The COVID-19 pandemic has gravely affected many economies and, in India, led to thousands of labourers losing their jobs making it much harder to

feed their families. We are assisting the Jesuits to provide essentials like food and medicine for some of the hardest hit families. It's a lifeline for some of the poorest people. Fr Deepak Edattu SJ from Kerala says: "We were able to support 3,072 families. The food kits are a great relief to the poorest of the poor. The people of Kerala are grateful to you for your constant support."

No community in the world, however rich or poor, can avoid the impact of climate change. People in low-income countries already face the most severe consequences and, in Madagascar, where 90% of the population live on less than \$1.90 a day, a deadly combination of poverty, poor infrastructure and climate change has led to a drought which has pushed more than 1 million people into food insecurity. The Arrupe Centre, supported by Jesuit Missions,

"Fr Stan may have been a prisoner but he died a free man. As he wrote: 'even a caged bird can sing.'"

is working hard to protect land through reforestation and restoration. It is also educating and empowering young people to be ambassadors for environmental protection in their local communities.

Young people in Britain led our campaign at COP 26 in Glasgow. We launched a petition before the Conference urging the Prime Minister to take bold action especially for the poorest communities. Thousands signed our petition which was handed into 10 Downing Street by students from Jesuit and Ursuline schools. In Glasgow, twenty of our supporters – some from as far afield as the USA – made a pilgrimage from Edinburgh to Glasgow praying for the success of COP 26. The extensive media coverage included nearly 30 different publications as well as local and national BBC Radio.

Although the outcome of COP 26 in Glasgow was disappointing, especially for countries most vulnerable to climate change, we are grateful to the students, parishioners and thousands of supporters who inspire us to continue to serve the faith by promoting justice. ●



Demo outside the Indian High Commission to support Father Stan Swamy SJ

BUILDING THE FOUNDATIONS FOR *Safeguarding*

Father David Smolira SJ explains how he instituted a new Safeguarding structure for religious congregations in England and Wales.



In January 2021, the Conference of Religious – which represents most religious congregations in England and Wales – asked the Jesuit Provincial, Fr Damian Howard SJ, if he could spare a suitable individual to help put into effect the new recommendations for those communities – the Institutes of Consecrated Life and Societies of Apostolic Life (ICLSAL), to give them their correct title – with respect to safeguarding in the Catholic Church of England and Wales. The Provincial agreed to second me for this task.

Both the Independent Review of Safeguarding Structures and Arrangements (The Elliott Review) and the Independent Inquiry into Child Sexual Abuse in the Catholic Church in England and Wales, published their

reports towards the end of 2020. Both were very critical of safeguarding failures in the Church and made a number of recommendations for change. Recommendation 10 of the Elliott Review states:

“The Review Panel recommends that a safeguarding resource for ICLSAL should be created, to replace the current alignment arrangements. We would see this body as... providing the same services as the dioceses currently do, to the same standards within the ‘One Church’ strategy to safeguarding...”

This then was my task, to set up a new safeguarding structure, soon to become known as the Religious Life Safeguarding Service (RLSS), that would serve the needs of religious congregations in England and Wales.

My first priority was to ensure that all religious were genuinely involved in the new project, given how easy it is for them to sometimes feel sidelined by top-down directives. I decided that if the process of setting up the RLSS was not genuinely consultative among religious congregations it would not be successful. So I went about establishing a series of monthly, open Zoom meetings with religious congregation leaders and their safeguarding leads, to explain the recommendations of the Elliott Review, and gradually build the components of a new structure for safeguarding through a process of consultation and lengthy Q & A sessions.

I was appointed as the lead religious for safeguarding implementation on the 18th January 2021 with the expectation that I would complete the safeguarding

project by June, a very short five months from when I started. The Church had been accused of being slow and unresponsive in safeguarding matters in the past and so it wanted to show itself in a fresh light by responding quickly to the new recommendations. Sometimes, though, one needs to take a little more time to genuinely consult and get the “buy-in” to make the project successful. Eventually I worked almost full-time on this project for nearly nine months.

As is so often the case, money was a big problem! Many religious congregations now have very few active members and some have the majority in some form of care facility. A good number of these congregations are living from hand-to-mouth without any significant income or reserves and so cannot afford to pay the required levy to be a member of the RLSS. To overcome this problem the RLSS established a Common Fund to assist those congregations which had an inability to pay all or part of the levy. Many religious congregations very generously contributed to this fund in a wonderful show of solidarity and now no religious congregation in financial difficulty will be prevented from joining the RLSS and receiving its services.

The RLSS will offer a full safeguarding service including training and case management and is already beginning to transfer cases from the dioceses, which provided that service to religious congregations previously. This transfer must be done with great professionalism and sensitivity to victim/survivors, so that they will not be traumatised further by this process.

I very much enjoyed the work of establishing the RLSS and was greatly helped by many religious from a wide range of congregations, particularly by Dani Wardman, then the Safeguarding Officer for the Conference of Religious. All this help, advice and support was offered freely and without any payment. In my opinion it demonstrates a real commitment on the part of religious to making the Church a safer place for everyone.

I wish the RLSS every success for the future. ●

Reference and administrative information

Trustees

The following trustees are in office as at 14 May 2022 and served throughout the financial year (unless otherwise stated)

Nicholas Austin SJ
 Brendan Callaghan SJ Appointed 10 July 2021
 Roger Dawson SJ Resigned 10 July 2021
 Damian Howard SJ (Provincial and Chairman)
 Kensy Joseph SJ
 Keith McMillan SJ (Treasurer and Secretary)
 Gerard Mitchell SJ Appointed 10 July 2021
 Paul Nicholson SJ (Socius)
 Dermot O'Connor SJ Resigned 10 July 2021
 Matthew Power SJ
 Stephen Power SJ
 David Smolira SJ

Principal address

114 Mount Street, London W1K 3AH

Auditor

Buzzacott LLP
 130 Wood Street, London EC2V 6DL

Bankers

HSBC Bank plc
 60 Queen Victoria Street, London EC4N 4TR

Lloyds Bank plc
 39 Threadneedle Street, London EC2R 8AU

Main Investment Managers

AXA Framlington Investment Management
 155 Bishopsgate, London EC2M 3XJ

CCLA
 Senator House, 85 Queen Victoria Street, London EC4V 4ET

Comgest Asset Management International Limited
 2 Grand Canal Square, Dublin 2, Ireland

Cordea Savills
 33 Margaret Street, London W1G 0JD

Estate Managers

Youngs RPS (incorporating Stanton Mortimer Limited)
 Priestpopple, Hexham, Northumberland NE46 1PS

HDAK
 B2 Pittman Court, Pittman Way, Fulwood, Preston PR2 9ZG

Insurance Brokers

PIB Insurance Brokers
 Poppleton Grange, Low Poppleton Lane, York YO26 6GZ

Solicitors

Stone King LLP
 13 Queen Square, Bath BA1 2HJ

Our short-term targets for 2020–2021

A reminder of what short-term targets we set ourselves for the year and a review of how we performed, i.e. what progress has been made

Target set	Progress made
Governance	
Formation and Development of the Apostolic Body.	
Communications	
With Peter's House, build new websites for the Province, Thinking Faith and St Beuno's	The new website for the Province was completed and is now online. The new websites for St Beuno's and Thinking Faith are due to be launched just after Easter 2022.
Develop and agree a digital marketing plan to reach new and younger audiences, using our channels as a net to invite people through a process of discernment, and ultimately engagement, as they seek to grow and deepen their faith	A plan was developed with a number of our Works to reach out to young UK Catholics and expanding audiences, including workshops across the Province to test new initiatives. A strategy was developed for digital marketing campaigns across 2022 for both St Beuno's and the London Jesuit Centre for resources, courses and retreats for young adults. A digital marketing campaign for the revamped Jesuit Institute was arranged for early 2022 while an experimental online vocations event is being planned for 2022. Support was also given to Jesuit Missions in their plans to engage a younger audience.
Development of the Province	
Prepare for a Province Congregation scheduled to take place in December 2021	Due to the pandemic, the Province Congregation was postponed to April 2022.
Set up a single London Jesuit Community to enhance the mission of the Jesuits in the capital and to equip it so as to make London a more attractive destination for Jesuits in formation from across the globe	A single London Jesuit Community has been established consisting of five main houses in London. We currently have six overseas-based Jesuits in formation, studying in a number of the universities in the south-east of England, which have a worldwide reputation for excellence. We hope to welcome more students, with several currently applying for entry to courses in September 2022.
Produce a report on the way in which the Province's works are already serving the Universal Apostolic Preferences of the Society of Jesus	This report was prepared and will be shared at the Province Congregation in April 2022.

Pilot a new programme for the delivery of ongoing formation to Jesuits, supported by a newly appointed Delegate for Ongoing Formation	This has been achieved with a number of online presentations being delivered covering topics from work with young adults to interreligious dialogue.
Explore the possibilities for a Jesuit mission in a part of Britain in which we are not currently present, e.g. the north-east	Agreement was reached in August 2021 with the Diocese of Hexham and Newcastle to establish a Community based at the Presbytery at St. Dominic's parish in Newcastle-upon-Tyne to carry out spirituality ministries in that parish and elsewhere in the Diocese.
Boost Jesuit manpower in Scotland so as to give impetus to the recent and ongoing apostolic discernment in that country	Two new parish priests and a new full-time Community Superior took up posts towards the end of 2021.
Safeguarding	
Provide accommodation for a project offering help to victims of abuse in the Church	A three-year lease has been given to Grief to Grace, which runs a specialised 5-day programme of spiritual and psychological healing for anyone who has suffered sexual, physical, emotional or spiritual abuse in childhood, adolescence or adulthood, including those who are the victims of rape, incest or abuse by a member of the clergy.
Provide significant capacity to facilitate the urgent renewal of safeguarding institutions by the Catholic Bishops' Conference of England and Wales and the Conference of Religious	Fr David Smolira SJ had a lead role in establishing the Religious Life Safeguarding Service (RLSS), which has been set up as part of the reorganisation of safeguarding in the Catholic Church in England and Wales following the Elliott Review and the Report of the Independent Inquiry into Child Sexual Abuse (IICSA). The RLSS aims to provide case management and training to religious congregations in England and Wales and help them to achieve best practice in safeguarding following the safeguarding standards set by the Catholic Safeguarding Standards Agency (CSSA). The Jesuits in Britain are members of both the RLSS and the CSSA.
Parish ministry	
The British Province's Pastoral Assistant gathers representatives to meet regularly to review pastoral activities in the parishes and chaplaincies we run.	
Launch the new Edinburgh Jesuit Centre by acclaimed Scottish historian Sir Tom Devine on St Andrew's Day, 30 November 2020, and provide a series of rejuvenated online talks, building on the success of its predecessor the Lauriston Jesuit Centre	The Edinburgh Jesuit Centre was launched as planned with Professor Tom Devine providing the inaugural lecture, on the feast of Scotland's patron, Saint Andrew. As the COVID-19 pandemic then restricted personal gatherings, the programme became a series of online events, which attracted a large, international audience with the 'Lockdowns from Lauriston' series, which involved eight internationally renowned speakers, attracting an audience of over 52,000 people from 51 countries. All the EJC talks can be accessed via the Centre's website.
Run a Jesuit Online Pastoral Conference in January 2021, a gathering of parish teams and some parishioners from the ten Jesuit parishes in Britain, which will provide an opportunity to support one another, to reflect on the current situation with respect to the parishes and our common Jesuit life, as well as to look to the future	The Online Pastoral Conference took place in January 2021 and used the Universal Apostolic Preferences as its theme.

Expand the online presence of the Birmingham University chaplaincy including the development of new social networks and media used by students, the creation of regular content and a revamp of the chaplaincy website	The chaplaincy launched its Instagram page in November 2020, which allowed it to reach more students given that about a third of the chaplaincy's social media followers are on Instagram. Weekly videos were produced for Facebook and Instagram during term time by the chaplains, increasing online engagement with students. The revamped chaplaincy website has a cleaner presentation and allows students (especially prospective residents at Newman House) to find information more easily.
Attend to the wasteland next to St Ignatius's Church, Stamford Hill, to level and decontaminate the ground	The land has been successfully cleared and levelled.
Education <p>The work of Jesuit schools is supervised by the Delegate for Education. The higher education sector has its own delegate.</p>	
Recruit a lay Province Delegate for Education	Dr John Stoer was appointed as the Province Delegate for Education on 1st September 2021.
In our two directly-controlled schools, further develop use of technology to enhance learning opportunities, and not only when remote learning is enforced	Classroom and online provision options and for lesson delivery have been implemented successfully throughout the year and there is a smooth transition between them. Initiatives to assess and enhance the learning further have been introduced. At Donhead School, a child well-being programme was launched and new pastoral meetings introduced for parents to liaise with form teachers and discuss any pastoral matters. St John's Beaumont School meanwhile was able to smoothly switch to online learning during lockdown and to maintain its online output throughout the academic year to support academic progress of children during periods of self-isolation. Academic progress was high during the year and not hindered by the pandemic. The implementation of strong infection control measures allowed both schools to remain open throughout the pandemic providing a safe environment for children to learn and be together.
Through the <i>Laudato Si'</i> Research Institute, Campion Hall (LSRI):	
Promote high-quality, transdisciplinary academic research that generates new forms of knowledge and new pathways for impact, including: hosting virtual research symposia on gratitude, women, and resource extraction, ethics of the use of virtual reality in clinical practice, and post-COVID-19 intellectual developments, producing academic publications and organising a number of public outreach events	These were not only achieved, but were exceeded in generation of symposia and events, some of which were online and held during the year. These included a book launch, public lectures, a multidisciplinary conference and a hybrid celebration event with lectures. The Research Institute was also responsible for the publication of 17 academic articles and books, with many more currently at press.
Resource practitioners to enable socio-ecological change, by: building partnerships with global players in socio-ecological transformation through the appointment of an Assistant Director – Policy and Practice, the development of the Global <i>Laudato Si'</i> research networks, new collaborations through Jesuit networks, and supporting other change agents	The LSRI has been actively involved in the <i>Laudato Si'</i> Action Platform, especially in its universities and parishes' sectors and in the <i>Laudato Si'</i> Tertiary Education Network, which led to new connections and opportunities for collaboration. The LSRI has also formed strategic partnerships with some key organisations such as Global Witness, the International Institute for the Environment and Development and the World Resources Institute.

Build collaborative projects with Churches in the Global South, chiefly through the Ecclesial Networks Alliance in Integral Ecology and with the Bishops' Conference in England and Wales, and through a current grant bid to support the decarbonisation of the RC Diocese of Salford	The LSRI continued its accompaniment of the Ecclesial Networks Alliance, and following the appointment of a carbon transition officer we carried out further work in building up the Alliance in Integral Ecology. The LSRI also gained the relevant grant to support the decarbonisation of the Catholic Church in a project coordinated by the RC Diocese of Salford. This resulted in the production of: <i>Caring for our Common Home in the Church and Beyond: Theological foundations for a comprehensive decarbonisation strategy in the Catholic Diocese.</i>
Gain permission from Oxford University to increase the 'cap' on postgraduate students at Campion Hall and to allow female students, and then, subject to permission, identify and purchase a property in central Oxford to serve as accommodation for the envisaged expanded student community at Campion Hall before the end of summer 2020	The Hall gained permission to increase the 'cap' on postgraduate students, and to admit female students. Offers were given to four female students for the Academic Year 2021-22. A property was purchased in central Oxford, just 100 metres from the main Hall building, and which is now available to students.
Run a Pedro Arrupe Summer School at Campion Hall in July 2021 on Forced Migration and re-establish the D'Arcy Lectures with an academic publisher	The Pedro Arrupe Summer School in Forced Migration for July 2021 was postponed due to COVID-19; it is hoped that this can run in 2022. The D'Arcy Lectures have been re-established with Georgetown University Press, and the next D'Arcy Lectures will be given in Trinity Term 2022.
Establish at least one new research post at Campion Hall for the academic year 2021-22 and onwards	The Copleston Senior Research Fellowship and Lectureship in Philosophy and Theology was established in collaboration with Blackfriars, Oxford, and the first five-year appointment made.
Develop stewardship of Rare Books, the Collection, and Archive, making the treasures of Campion Hall more accessible to members of the wider academic and Church communities	A condition assessment of the Rare Books was commissioned and executed, and research in the provenance of the incunables continued, although slowed due to the pandemic. This will enable these to be recorded in the Consortium of European Research Libraries, Material Evidence in Incunabula (CERL MEI), a database specifically designed to record ownership, decoration, binding, manuscript annotations, stamps, prices, etc. of 15th-century printed books. The Hall also joined the University's Digital Archive system, to enable storage of important files for an ongoing archive, including high quality copies of the Art Collection. Work continued on the Art Collection, including conservation of important artefacts in the Chapel and of the Salvator Mundi of the school of Massys.

Formation

The formation of young Jesuits is supervised by a Delegate of the Provincial.

Partner with the Order of Preachers in the training of priests by supporting the work of the Dominican Studium in Oxford

Trustees approved ongoing funding for the Studium covering a five-year period starting in September 2021.

Set up a further house in south London to serve as the location of a MAGIS@Home community of young Catholic adults

A second residential community in London was established in Spring 2021. The MAGIS@Home programme, initially for one year, is designed to allow young working Catholics (aged 22–35) to experience shared Christian life alongside their work or studies.

Contribute to the strengthening of the Paris Formation Centre to make it viable in the long term	Trustees continue to explore ways of giving financial support to the Paris Formation Centre.
Start the rebuilding of the novitiate house in Birmingham	Building started on site in 2021 and the Community expect to move back into the House following its substantial completion in May 2022. The chapel is expected to be completed before the end of Summer.
Streamline our provision of Ignatian formation and spirituality outreach by uniting the Jesuit Institute and the Jesuit Spirituality Team	The two teams were brought together with effect from 1 October 2021 and operate under the Jesuit Institute.

Social justice and the relief of poverty

Work for the poorest is carried out in parishes and also in our projects for the marginalised, including through the Jesuit Refugee Service (JRS UK).

Meet the basic needs of around 350 destitute asylum seekers, either remotely through our COVID-19 emergency operation, or through our Day Centre (public health allowing)	In a year of two halves, remote deliveries of essential food and toiletries were made to refugee friends across Greater London before we restarted face-to-face support through the new 'JRS Shop'. 355 refugee friends were provided with regular food, toiletries, hardship grants, mobile phone data, and warm clothing.
Provide advice, support and casework to around 130 asylum seekers and enable them to access vital help provided by others	The JRS UK advice and support team offered practical support, emotional accompaniment, and handled complex casework for 340 refugee friends. Access to healthcare was an undercurrent of the casework throughout the year, and JRS UK partnered with Barts' NHS Trust to host pop-up COVID-19 vaccine clinics for refugee friends who wouldn't otherwise have been vaccinated.
Provide electronic devices to 50 destitute asylum seekers to enable them to keep in touch with others, participate in activities and access education	Responding to the digital divide, which COVID-19 shone a light on, JRS UK provided over 54 phones and laptops to refugee friends, enabling access to education, healthcare and justice.
Provide accommodation to 15 homeless destitute asylum seekers through our accommodation projects, either through the At Home hosting scheme or at our new accommodation project at Emilie House	JRS UK formally opened a new house for asylum seeking women – Emilie House has the capacity to provide women with stable accommodation at any one time. Across Emilie House and hosting, JRS UK provided 16 destitute asylum seekers with accommodation this year.
Publish a report reflecting on the asylum system from the perspective of Catholic Social Teaching and continue to respond to policy developments affecting destitute and detained asylum seekers especially in the context of COVID-19 and its aftermath, advocating for person-centred, evidence-based solutions in collaboration with others	Being Human is JRS UK's flagship report, bringing together refugee experience, Catholic Social Teaching, and over twenty years' asylum policy. Being Human presents an alternative vision of what a person-centred asylum system could be, in the context of a fast-shifting and increasingly hostile public policy environment.

Host a diverse programme of refugee activities to help build resilience, learn and develop skills, and allow joy to enter once again into the hearts of our friends. JRS aims to celebrate their creative output through a public event	A diverse programme of refugee-led activities took place over the last year, from creative writing, to photography, to drama and even acupuncture. The creativeness of refugee friends was celebrated in a number of online showcases, as part of the JRS UK Accompaniment in Action series of talks and events.
Work at Province level with the personnel of the Irish Province to enhance and coordinate our work in integral ecology	A Joint Ecology Group (JEG) has been set up, which meets every two months to review issues going on in both Provinces. In the lead up to the COP26 Conference in Glasgow, the Irish Jesuit Centre for Faith and Justice and the British Jesuit Missions office came together to plan action.

Spirituality

The Province's work in spirituality is carried out under the direction of a Delegate of the Provincial.

Extend our online retreat offerings, mainly via Zoom, of Individually Guided Retreats and Retreats in Daily Life. These are expected to be offered as individually guided retreats with and without a group element	Online retreats and training have been extended significantly, in part, in response to COVID-19 and in part due to our planned expansion of retreat work to a wider constituency. At St Beuno's, the offer of regular online individually guided retreats initiated during lockdown (when it was closed to visitors) continued after its reopening in May. While there were fewer participants there were still enough to indicate that a need was being met with about 200 people making online guided retreats over the year. The Ignatian Spirituality Centre in Glasgow extended their offer of online retreat offerings, which proved to be popular events. Living Theology online courses proved successful again with similar numbers to the previous year.
Add at least two more languages to Pray-As-You-Go (PAYG) in collaboration with other Jesuit Provinces	While only one new language has been added, funds have been secured from a 'Light up a Language' campaign, which should result in progress being made in the near future.
Redesign the PAYG website and app (new aesthetic/tech designs; new features and functionalities such as journaling and notifications), while also expanding PAYG AI assistant availability to Google Home	The redesign of the PAYG website has been completed, along with a new app. These are due to be launched soon to expand our AI assistant additions. Conversations have begun with other Works of the Province in order to work more closely with them in the coming years.
Carry out a survey of Thinking Faith's (TF) readership to assess current demographic and interest in new forms of content (e.g. shorter form articles, audio content, etc.)	The development of the Thinking Faith site has been deferred, to allow the reprioritising of other Works within the Province. However, we have already held workshops and meetings with a view to shaping the future direction of the journal, and engaged an external agency to carry out research and a survey of current and target audiences so that the site is developed in a way that allows it to fulfil our mission.
Contribute to the celebration of the Ignatian year at a Province and global level through, for example, an audio Ignatian introductory prayer course on PAYG and series on Jesuit saints on TF	Much of this material has been achieved by developing in partnership with the spirituality work of the Province an extensive programme of book clubs, retreats, an Ignatian Novena, plays, courses, talks, pilgrimages and art competitions. One such example was the Thinking Faith series on Jesuit saints in November 2021.

Commence the next phase of the building works at St Beuno's including relocating the kitchen and providing a new large meeting room, a new Chapel entrance, a new Community dining room and four new disabled-access bedrooms	This phase of the building work got underway during lockdown. Perhaps inevitably it encountered a number of delays and the work will now finish in 2022. The standard of build and detail is very high and will add considerably to the facilities at St Beuno's.
Recruit the first lay Director of St Beuno's Jesuit Spirituality Centre	A lay Director was appointed to St Beuno's in July 2021.
Renew the team of Jesuits living and working at St Beuno's	As the former Jesuit Director and Superior moved on to other Works and Communities, two more Jesuits joined the team at St Beuno's.
Work worldwide	
The office that coordinates this work is that of Jesuit Missions with its director.	
Participate in the campaigning for the COP 26, Glasgow, providing leadership on this within the Province and Xavier Network	Jesuit Missions led a campaign focusing on COP 26. The Jesuit schools and parishes across the UK participated enthusiastically with several students presenting our petition for COP 26 to the Prime Minister at Downing Street. We were present at the COP alongside Jesuit colleagues from around the world and obtained good media coverage for our campaign.
Update website to create a more contemporary image of Jesuit Missions and to familiarise our supporters with the wide range of projects that we support	The work on our website has been delayed pending a review – currently taking place – into our organisational branding.
Increase the advocacy and campaigning efforts of our supporters	The year saw Jesuit Missions engage actively in several campaigns around COP 26, the unjust detention and subsequent death in custody of Fr Stan Swamy SJ in India, and the need for wider access to vaccines.
Expand our supporter base via social media, especially recruiting younger supporters	Our presence on social media has increased thanks to the campaigns we have run. Hundreds of new supporters have joined our efforts. The young participated in our COP pilgrimage as well as online.
Develop a Catholic Social Teaching Workshop for parishes	We ran a pilot workshop for a parish in south London on Catholic Social Teaching which was well received. We hope to provide something similar in a parish in northern England in the current year.
Develop a more effective fundraising strategy which begins to diversify our income	While our supporters remain incredibly loyal and generous, Jesuit Missions' income, like that of many charities, has been under pressure during the pandemic. It is an area we will focus on in the current year.
Increase our knowledge of programme impact to improve future programmes	We have strengthened our approach to learning and evaluation. Regular reports are received from our international partners and these provide invaluable information to help us support their work and build local capacity.

Short-term targets for 2021–2022

– what will we do?

A number of targets have been set for the forthcoming year

Governance

Formation and Development of the Apostolic Body. For the coming year we aim to:

Communications

- Improve the visibility of the British Province across both religious and general media outlets
- Continue to develop the Province's multi-media and digital offerings, in terms of new websites for individual Works, a greater video presence, and enhanced use of our social media channels, as well as supporting the development and improvement of general digital resources
- Support Works in developing their branding and digital marketing in order to draw in new audiences especially young adults.

Safeguarding

- Recruit new safeguarding personnel and set up a new Safeguarding Commission to replace the former Independent Safeguarding Commission in line with the new structures in place for the Church in England and Wales
- Complete the project of digitalisation of safeguarding files
- Offer financial support to impoverished religious congregations to enable them to affiliate to the Church's new safeguarding structures.

Archives

- Undertake renovation work on the Archives to create a more stable environment for the preservation of the unique collections as well as increasing the storage capacity
- Ensure that a completed Disaster Plan is prepared to mitigate against any potential future disaster.

Treasury

- Successfully implement a new health and safety system across the British Province
- Begin the work of converting TRCP to a Charitable Incorporated Organisation
- Increase our overall fundraising capability.

General

- Contribute to the Synodal Process currently taking place in the Universal Church.

Parish ministry

The British Province's Pastoral Assistant gathers representatives to meet regularly to review pastoral activities in the parishes and chaplaincies we run.

For the coming year we aim to:

- Organise a residential Pastoral Conference in October 2021 – with the theme of Synodality, plus the Universal Apostolic Preferences
- At the invitation of Pope Francis, explore the concept of Synodality and investigate ways in which it can be introduced into our parish life
- Continue regular Zoom sessions for our Pastoral Team, whilst searching ways of using online sessions to deepen people's faith and enrich parish life

- Start planning for a major development on the site of the wasteland in Stamford Hill with a view to consolidating our London presence
- Begin the task of refurbishing the Edinburgh residence
- Purchase a property in Manchester to house the community in the light of extended redevelopment work on Avila House (a Diocesan building) to make it fit for purpose
- Seek to locate in London a new joint European-African pastoral project aimed at serving diaspora African communities.

Education

The work of Jesuit schools is supervised by the Jesuit Institute. The higher education sector has its own delegate. For the coming year we aim to:

- Increase student awareness of, and engagement with, Ignatian spirituality and Jesuit ministries in collaboration with other Jesuit Works and communities
- Nominate a new chaplain for the Birmingham University Chaplaincy to take over from Fr Kensy Joseph SJ at the start of the new academic year (2022) and ensure a smooth handover
- Progress the question of academisation of our VA schools
- Gather Jesuit governors for consultations on the future of our work in schools
- Complete phase I of the energy upgrade programme at St John's Beaumont School
- Establish a Departmental Lectureship in Modern Catholic Theology in the University of Oxford Faculty of Theology of Religion, and recruit for its first postholder

- Run the first Pedro Arrupe Summer School in Forced Migration at Campion Hall in July 2022, with participants from around the world and leading academics and practitioners in the field
- Host a three-day symposium ‘The Road to a Synodal Church,’ as part of the global process initiated by Pope Francis to explore the ‘synodal conversion’ of the Church
- Promote academic research that generates new forms of knowledge and new pathways for impact, including: hosting an international conference on land and agriculture, hybrid public lectures, and seminars; welcoming visiting fellows and scholars and launching the affiliate programme; producing academic and popular publications; and launching a research paper series, a magazine at the interface of the academy and practice, and a briefing notes series
- Resource practitioners to enable socio-ecological change by building partnerships with global players in transformation through networking and roundtable listening events, the development of the Global *Laudato Si’* research networks, creation of a new integral ecology library through international partnerships, forming new collaborations through Jesuit networks, and supporting other change agents
- Build collaborative projects with networks in the Global South, chiefly through the Ecclesial Networks Alliance in Integral Ecology and with the Bishops’ Conference in England and Wales, and decarbonisation efforts among the Jesuits and the Diocese of Salford.

Formation

The formation of young Jesuits is supervised by a Delegate of the Provincial. For the coming year we aim to:

- Open and occupy the new novitiate building in Birmingham
- Work with other Provinces sending their novices to Birmingham to streamline admissions procedures
- Add capacity to the Vocations Team and devise a clear vocations strategy
- Contribute to the strengthening of the Paris Formation Centre to make it viable in the long term.

Social justice and the relief of poverty

Work for the poorest is carried out in parishes and also in our projects for the marginalised. Mostly through the work of the Jesuit Refugee Service (JRS) we aim to:

- Respond to the physical, social, and spiritual needs of 340 destitute asylum seekers and their families in a holistic, wrap-around way which meets basic daily needs, provides professional legal advice, casework support, and pastoral care
- Accommodate street homeless destitute asylum seekers through two accommodation projects, At Home hosting and Emilie House for women
- Provide pastoral support and casework support to people in immigration detention at Heathrow IRCs through regular welfare surgeries and social visitors
- Working alongside others to respond to the physical, social and spiritual needs of asylum seekers in quasi-detention in Napier Barracks
- Undertake research and produce reports to policy makers arguing for a change in the unjust policies and laws that affect those we accompany, using media to influence change.

Care of infirm and elderly Jesuits

For the coming year, we aim to:

- Review succession planning requirements for our two healthcare teams.

Spirituality

The Province’s work in spirituality is carried out under the direction of a Delegate of the Provincial. For the coming year, we aim to:

- Extend the St Beuno’s Spirituality Centre in North Wales
- Offer a Lent retreat on the life of Ignatius (to celebrate 500 years since his conversion) with music, pictures, Scripture and story on both the web and through an app.
- Set up the Jesuit Institute as a coherent body at the service of Ignatian Formation for the Province’s Works and beyond
- Develop *Thinking Faith*, *Pray-As-You-Go* and *The Way* utilising digital marketing.

Work worldwide

The office that coordinates this work is that of Jesuit Missions with its director. For the coming year we aim to:

- Develop two international and one environmental campaign for the year to be delivered to constituents through visits to schools and university chaplaincies, parish appeals, talks by guest speakers and workshops
- Promote new regular giving and increase regular givers by 25%
- Develop four working programmes with partners: environment and sustainability, youth education and formation, resilience through livelihoods and pastoral accompaniment, with additional funding for ‘solidarity’ and emergency projects
- Strengthen organisational learning, including a comparative impact assessment of projects
- Improve the quality of accompaniment, including a needs assessment of partners
- Research, plan and implement a successful rebrand for Jesuit Missions.

Finance and administration

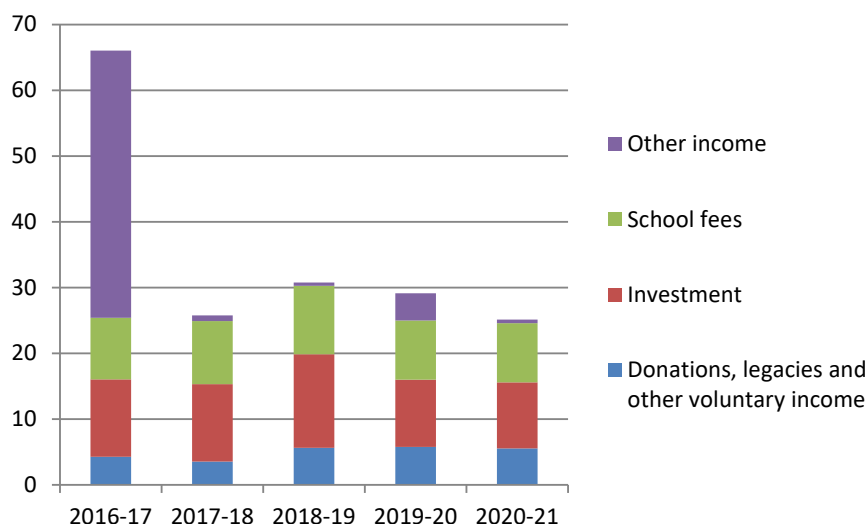
Financial Review

Income

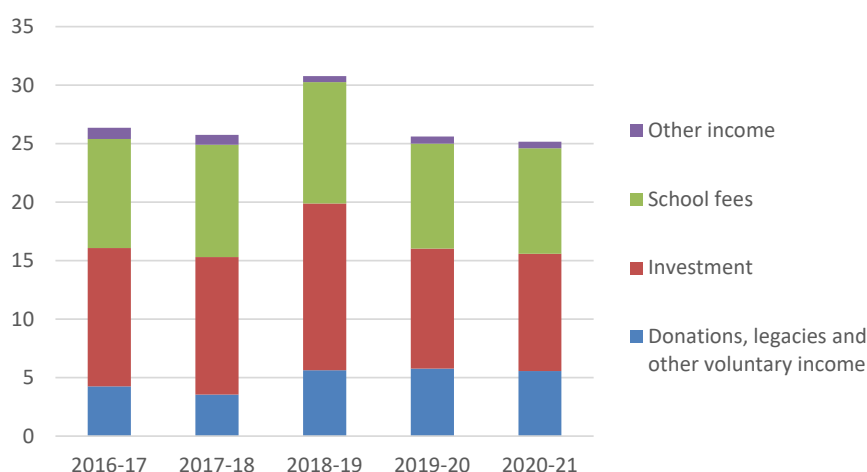
Income fell sharply to £25.2m in 2020-2021 down 14% from £29.1m the previous year. However, £3.5m of the income in 2019-2020 was directly attributable to default interest charged for the late payment of a property sale.

Looking for trends in total income over the last 5 years is difficult given the one-off property sale in 2016-2017.

Total income - 5 year history (£m)



Total income (excluding one-off property sales) - 5 year history (£m)



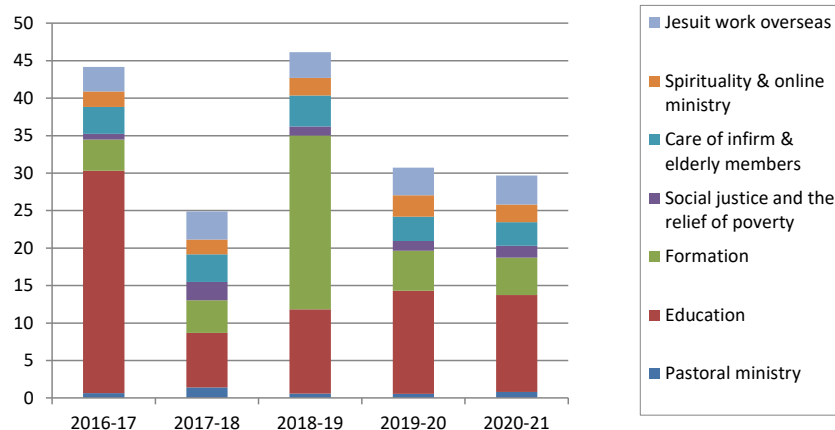
In order to compare from year to year entails excluding this one-off receipt as shown in this second graph. This highlights what seems to be unusually high investment income in 2018-2019. However, this increase reflects the investment of the initial proceeds from the sale of the Kensington property, since when investment returns have dropped significantly following the onset of the pandemic. Dividend returns have also been affected by the change towards a more global investment portfolio.

Charitable expenditure

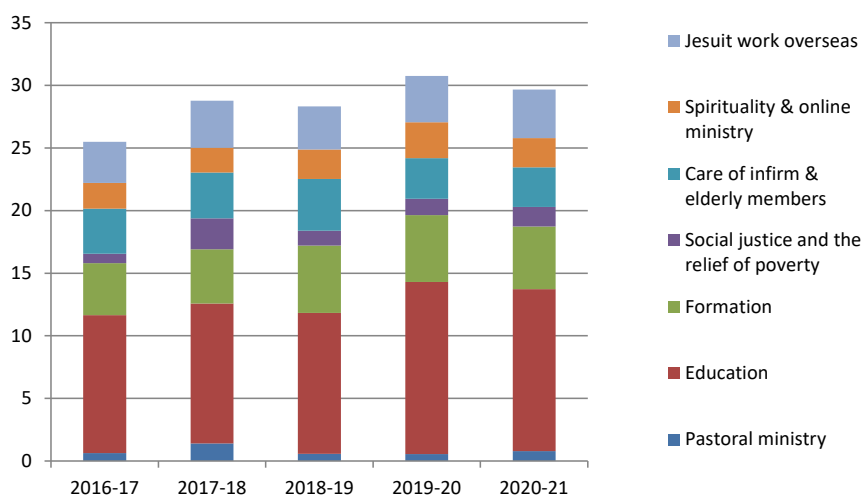
The Charity's expenditure on its charitable activities for the year was slightly down at £29.7m compared with 2019-2020 when it was £30.7m. This reflected a fall in expenditure in education costs (down £0.8m to £12.9m).

Looking at a five-year period, charitable expenditure has fluctuated sharply from year to year, the result of some large one-off grants. In 2016-2017, £18.7m was given to Heythrop College to cover its teach-out and closure costs to ensure an orderly closure. However, this proved to be an over-provision, so in 2017-2018 there was a write-back of £3.9m which reduced costs in that year. In 2018-2019, a grant of 20 million euros (£17.7m) was given to the Jesuit Delegation in Rome for the support of the formation of priests at the Gesù College.

Total charitable expenditure - 5 year history (£m)



Total charitable expenditure (excluding one-off major grants) - 5 year history (£m)



Adjusting for these 'exceptional' amounts reveals a general upwards trend in charitable expenditure, despite a small fall-back in 2020-2021.

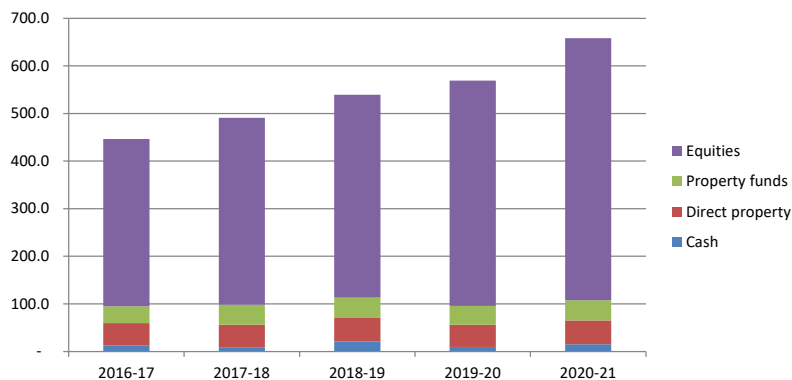
Net expenditure before gains on investments

A net deficit (before investment gains) of £7.8m was recorded during the year, compared with a net deficit of £4.4m in 2019-2020, which reflects the drop in other income mentioned above.

Investments

Investment gains amounted to £89.9m, which followed on from gains of £35.1m in 2019-2020. Most gains remain unrealised in nature and therefore remain open to the volatility of equity markets, which in recent times has included a major pandemic and more recently war in Europe. Emphasis continues to be placed on holding sufficient cash reserves, so that sell-offs are not required to fund our work at a time when markets are weak.

Investments - 5 year history (£m)



Net movement in funds

The current year deficit was more than offset by the investment gains, resulting in a positive movement in funds of £82.2m. This followed another net positive movement in funds in 2019-2020 of £30.8m, again entirely due to mainly unrealised investment gains.

The Funds of the Charity

As a result of significant investment gain during the year, the total funds of the Charity amount to £758.6m compared to funds a year earlier of £676.4m.

Funds fall into three categories:

Restricted Funds: £83.5m of our funds are for particular projects, subject to specific conditions imposed by the original donors. Trustees agreed with our auditors that the funds previously classified as restricted funds should more correctly be shown as designated funds. The balances were transferred with effect 30 September 2021. These are described in fuller detail in the notes to the accounts.

Designated Funds: £669.9m of our funds are designated (or set aside) in order to enable the Society to further fulfil its mission, i.e. the service of faith and the promotion of justice, as described more fully in this report. Although the Jesuit constitution provides that its funds may be built up to promote and endow its colleges and other Works, permanent endowment is not allowed to its religious communities whose members have completed formation and are not in care. Jesuits covenant any income they receive to the Trust, so that all salaries, pensions, royalties, personal legacies, etc. are used for the Works of the Trust, with the Trust meeting their living costs.

There are four main funds of the Jesuits in Britain, which have been designated to:

- Founding new institutes and work (Foundations Fund)
- Promoting and subsidising the Jesuits in Britain's Works (Apostolic Works Fund)
- Paying the costs of study and training of Jesuits (Formation Fund)
- Providing for sick and elderly Jesuits (Old Age Fund).

By designation of funds, the trustees retain the flexibility to respond to changing needs, while providing a useful method of balancing the different claims on funds.

More information on the designations is given in notes to the accounts.

Unrestricted Funds: in addition to the funds referred to above, general funds of £5.2m are available to support the work of the Jesuits in Britain in the future. These reduced from £6.5m during the course of the year.

Fundraising

The COVID-19 pandemic meant this was a challenging year for many people, yet many have generously continued to support our ministry in various ways. Together with their prayers, being part of a Jesuit parish or being connected with one of our Works, many have also made a donation. We take our responsibilities to all our supporters seriously, not only to comply with our legal and regulatory duties, but also knowing that our supporters' donations are also an expression of their faith and their partnership with us in building the Kingdom of God. We are grateful to all those who join us in our mission through our fundraising: individual supporters, grant givers, other religious orders and those who remember us in their will.

Our fundraisers

Primary responsibility for fundraising rests with our Apostolic Works. This is supported by the Treasurer and the fundraising manager. During the year there were appeals to support the development of new languages for Pray-As-You-Go, including the establishment of a tax efficient giving vehicle for US donors. An appeal for the refurbishment of St Beuno's Rock Chapel meant that these works could be concluded with a number of supporters commenting how glad they were to have had the chance to be a part of this.

During this year plans to develop fundraising in the US to support Campion Hall & LSRI were advanced.

Trustees receive a fundraising report at each trustees' meeting to monitor this area of work.

Regulation

We are registered with the Fundraising Regulator.

We do not sell or share details of those who support us with another

company or charity for marketing purposes. During the year we updated our Privacy Notice & Data Protection Policy to better reflect how we handle our stakeholders' data in accordance with their wishes and the Data Protection Act 2018.

We also commenced a data audit to ensure compliance and we also held data protection training for staff in June.

Fundraising complaints

There were no complaints received in this period and those involved in fundraising are attentive to potentially vulnerable persons.

Fundraising in the future

Following COVID-19 we are sensitive to the many demands on those who support us and realise that some may not be able to support us in the same way they have in the past. They remain very much part of the Jesuit family and we are grateful for their past support. We are sure that significant demands will be made on us and are grateful to those who partner with us in our fundraising to respond to these challenges with practical and pastoral care.

In the coming year, we plan to:

- hold staff data protection training
- deliver fundraising training
- make fundraising appeals for the Apostolic Works
- develop US support for Campion Hall (including the *Laudato Si'* Research Institute)
- ensure our Gift Aid records are up to date and compliant with HMRC requirements
- look after our supporters with gratitude and care.

The Jesuit Archives

The Jesuits in Britain Archives collects, preserves, and makes available records concerning the British Province of the Society of Jesus. In 2020-21, the Archives supervised 22 visitors, which is considerably lower than previous years due to COVID-19 ongoing restrictions and concerns. The Archives has continued to respond to remote enquiries and in the past year dealt with 196 enquiries.

On 1 March 2021, the first online exhibition was launched jointly with Stonyhurst College Collections and up to the end of September 2021, this had attracted 6,300 unique visitors. It remains live and a new joint online exhibition is planned for 2021-22. Related to the relic exhibition a first podcast was produced which had 77 plays from its release in August 2021 to September 2021. The Archives also launched their own standalone website in July 2021 and in that period shared three new blog posts on this. From its launch until the end of September 2021 there were 132 unique visitors to the Archives website. The Archives continues to contribute to the Province website, with two blogs shared on the new website having previously contributed 15 posts to the old site in the past year. Another new online venture for the Archives was the setting up of a Twitter account and in the first year 432 followers signed-up and 424 tweets were posted. Unlike the increase in outreach activities, cataloguing progress remained limited in 2020-21 due to the pandemic. The Archives was, however, still able to provide remote volunteering opportunities to two individuals considering a career in the heritage profession. Finally, 2020-21 saw the production of a new 5-year development plan to guide the Archives in setting targets for October 2021 to September 2025.

Reserves Policy

The level of reserves held is a matter for trustees, who review the reserves from time to time with a view to using surplus funds in accordance with the Trust deed, while also recognising the need to hold reserves in order to underwrite their day-to-day activities. Trustees also take into consideration a number of other factors, namely the reliability of the Charity's income, flexibility of costs in terms of whether they are fixed or variable, availability of cash, the requirements to invest in order to deliver its objectives and also the level of reserves in its various designated funds. The trustees' policy is to aim to hold between 6 months' worth of premises costs and 3 months'

worth of administration and other support costs, which for the year ended 30 September 2021 equated to £5,274k (2019-2020: £4,435k). General funds at £5,220k are very close to target levels. The charity will continue to monitor reserves closely over time.

Grant-making Policy

Funds are used principally to support work closely aligned with the work of the Society of Jesus, using its various restricted funds to support, for example, the work of the Guyana Region, along with Jesuit Works in South Africa and Zimbabwe (both former regions of the British Province and where historical links remain).

Trustees do not consider applications from the general public. A number of minor grants are however made to organisations and individuals whose work is aligned with that of the Jesuits in Britain through the Fund for Social Justice.

Investment Policy

The Trust's investment portfolio is overseen by an Investment Committee. Currently, the portfolio consists of listed investments, cash deposits and investment properties and this is expected to continue. However, the Investment Committee reviews the strategic allocation on a regular basis, the last time having been during 2020.

The equity portfolio is divided between three main managers. Within specified guidelines, the investment managers' objectives are to maximise total return, whilst providing a level of income advised by the trustees each year. The performance of each manager is reviewed on at least a quarterly basis and changes are made from time to time, if deemed beneficial. Indeed, one of the managers was replaced during the financial year. As at the year end, the total market value of our investments was £658.3m (2019-2020: £569.3m).

During the year, with the advice of the Investment Committee, trustees asked investment managers to widen the range of equities to be more global. This proved to be a beneficial move with global markets outperforming UK markets.

(Ethical) Responsible Investment Policy

Our policy provides a set of principles, looking forward to the type of world which we want to promote through our investments; intentionally investing in line with our fundamental ideals; supporting policies and initiatives in companies that promote the values of Catholic Social Thought, while still earning a just and sufficient return to help fund our Works. Our policy is also informed by the UK Stewardship Code of the Financial Reporting Council, which promotes seven helpful principles for institutional investors. The trustees work to uphold the United Nations Principles for Responsible Investment within which institutional investors pledge to incorporate environmental, social and governance issues into investment decision-making processes, being active owners across all asset classes.

We do not invest in companies whose products or policies are counter to the values of Catholic moral teaching. Our investment managers screen our portfolios (using agencies such as MSCI) to eliminate such stocks.

The charity divested from fossil fuels in 2020; that is to say from all the major energy companies that extract or refine oil, gas and coal. This decision fits with what Pope Francis referred to in his encyclical *Laudato Si'* when he wrote "We know that technology based on the use of highly polluting fossil fuels – especially coal, but also oil and, to a lesser degree, gas – needs to be progressively replaced without delay."

It is clear that the continued use of fossil fuels has been badly damaging the planet through the emissions they produce. With the likelihood of restrictions on use, the reserves of these fuels are likely to become 'stranded assets'; assets in danger of being regulated as unusable and therefore valueless. The case for divestment makes good economic as well as ecological sense!

Such divestment is just part of a process of decarbonisation of our investment portfolios, along with our Jesuit Works and all the properties. Investment managers now have flooded

into the trending space of concern for ESG; Environmental, Social and Governance issues. We are looking to greatly improve the standard of reporting on ESG by our three main managers. One aspect contained in reports is that of measuring the carbon footprint of what we hold. Conventional metrics so far only measure what are called scope 1 and 2 emissions, those for which companies are directly responsible. A realistic footprint has to include scope 3, those emissions within the supply chains. Pressure is needed to at least have that figure estimated.

Significant parts of the banking system help to fund fossil fuel companies. We co-filed on a resolution for the Barclays AGM asking the bank to plan and report on how they are to be compliant with the 2015 Paris accords going forward and we were doing the same with HSBC. In more recent months, we have divested from these two holdings.

A part of the 'S' in ESG includes concern for what social impacts are made by the companies we hold in our portfolios, working towards this being maximised. There are several consultants now who are trying to measure how firms are promoting the UN Social Development Goals (SDGs). This is not in any way an exact science at the moment. However, when we last selected an investment manager, we ensured it was one that can help to improve this reporting on the SDGs and, indeed, with all ESG concerns.

There are several other issues that we expect our asset managers to engage companies on, such as paying the living wage, reviewing executive pay, awareness of human trafficking in their work or supply chains and diversity on their governing boards with voting at AGMs according to our principles, to name a few. As trusts like ours are limited in the capacity and expertise to

follow up fully on all these matters, it is effective for us to work within like-minded networks such as the Church Investors Group, the Association of Provincial Bursars and ShareAction's Charities Responsible Investment Network. We are concerned to work with and facilitate other like-minded bodies in the Church.

Basis for Accounts Preparation

The financial statements have been prepared based on the accounting policies set out after the financial statements and comply with the Charity's Trust deeds, applicable law and the requirements of the Statement of Recommended Practice (SORP FRS 102).

How we manage our affairs

The Board of Trustees

The Declaration of Trust dated 20 March 1929 provides that new trustees shall be appointed by resolution of the existing trustees. The trustees are incorporated under the Charities Act 2011 as 'Trustees for Roman Catholic Purposes Registered' (TRCPR).

As members of the Society, the trustees' living and personal expenses during the year are borne by the Trust. Trustees receive no remuneration for services as trustees.

The trustees met formally six times during the year.

Trustees are chosen from members of the Society for their experience of the various Works of the Trust, as described in this report. Given their considerable knowledge of these Works, their induction focuses on the more technical responsibilities of trustees. This is achieved primarily by mentoring within the group, with sessions occasionally given over to discussion of a particular

aspect of trustee responsibility, e.g. the Objects of the Trust. Use is made also of external seminars for ongoing training. The rotation of appointments is made so as to ensure a continuing body of experience within the group as a whole.

Organisational Structure

The overall responsibility for activities of the Jesuits in Britain (the British Province of the Society of Jesus) lies with the Provincial Superior, who is assisted by his Socius and by the Treasurer, and other central office staff. The Provincial, Fr Damian Howard SJ, meets with a group of Consultors monthly.

Each Jesuit community is guided by a local Superior who has responsibility for the activities of the Province in that locality.

Particular Works (schools, retreat centres, etc.) may be the responsibility

of a 'Director of Work' appointed by the Provincial or by a local governing body acting on the Provincial's behalf. It is normal for the Provincial to visit all Jesuit communities and Works each year.

Constitution

The Jesuits in Britain are governed by the constitutions of the Society of Jesus and regulated by Canon law. The assets of the Jesuits in Britain are held in the following charitable trusts:

- Deed poll, dated 1 December 1921 of Society of Jesus Trust of 1921 for Roman Catholic Purposes (Charity Registration number 230166);
- Declaration of Trust, dated 20 March 1929 and subsidiary deed dated 3 April 1969 (Jesuit Development Fund) of Society of Jesus Trust of 1929 for Roman Catholic Purposes (Charity Registration number 230165);

- Trust deed dated 11 June 1990 establishing The Society of Jesus Charitable Trust (Charity Registration number 803659);
- Trust Deed dated 1998 establishing the Young Priests' Fund (Charity Registration number 1184304);
- Beaumont Educational Trust (Charity Registration number 309142); and
- von Hugel Charity (Charity Registration number 278966).

The Society of Jesus Trust of 1929 for Roman Catholic Purposes has been given charitable status by the Office of the Scottish Charity Regulator (OSCR) under Charity number SC 040490.

The charities are treated as a single charity for accounting purposes (under Charity Registration number 230165), in accordance with uniting directions issued by the Charity Commission.

The Young Priests' Fund exists to encourage and support candidates for the priesthood.

The Beaumont Educational Trust is a small fund generating bursaries to be applied in promoting the education of boys and young men in need of financial assistance in accordance with the doctrines of the Roman Catholic Church. Preference is given to those who can claim a connection with the former Beaumont College, Old Windsor. Its trustees are the same as those of the Trust and the two charities are treated as a single charity for accounting purposes.

The von Hugel Charity is connected with Corpus Christi Church in Boscombe. This charity is for the promotion, advancement or support of charitable work or works, at the absolute discretion of the charity's trustees, in the beneficial area (namely the Roman Catholic parishes of Boscombe and Ilford).

Connected Charities

Mary Patricia O'Halloran Charity
(Charity Registration number 509563)

This is a charity set up on the death of Mary Patricia O'Halloran, originally to benefit the poor of the Holy Name Parish in Manchester, but subsequently widened to serve the poor of the city

of Manchester. Trustees for Roman Catholic Purposes Registered are the Corporate Trustee for this charity, on the basis that the Society owns and uses Holy Name Church. Approval was given on the understanding that the funds would be kept separate and the charity has not been consolidated into these accounts.

Heythrop Institute

(Charity Registration number 312923)

The Heythrop Institute formerly known as Heythrop College operated as the specialist Philosophy and Theology College of the University of London from 1970 until its closure at the end of January 2019. The Society of Jesus, which originally founded the College before setting it up as an individual charity in 1970, has taken back control of the charity through appointment of its trustees. A change to the Royal Charter was granted by the Privy Council in February 2020, along with a change in name to the Heythrop Institute. These may allow the charity to operate again in some limited form. The charity has not been consolidated into these accounts.

Committee Structure

Five main committees are appointed by the trustees to assist in their work.

Investment Committee

The principal role of the Investment Committee is to give advice on the management of and review the performance of the investment portfolios, while upholding the ethical restrictions on our investments.

The Investment Committee meets on a regular basis as need dictates, but at least five times a year. At each of the scheduled quarterly meetings, one of its investment managers appears before it in order to make a presentation reviewing the performance of each portfolio over the previous 12 months, to discuss economic prospects for the forthcoming year and to answer questions. The fifth meeting is dedicated to a review of its ethical investment policy.

Its current members are:

Mrs Marta Albert
Mr Richard Brumby
Mr Timothy Edwards
Fr Keith McMillan SJ (Chair)
Fr Christopher Pedley SJ
Br Stephen Power SJ
Mr Richard Saunders
Mr Stephen Withnell

Mr James Holt served on the Committee throughout the year, but resigned with effect from 1 February 2022.

Additional members, who join for the review of its ethical policy are:

Fr Nick Austin SJ
Mr Paul Chitnis
Dr Celia Deane-Drummond
Br Geoff te Braake SJ
Fr Frank Turner SJ

Finance Committee

The principal role of the Finance Committee is to consider operational financial matters, including accounting, banking, insurance, property, HR and other resourcing issues.

Its current members are:

Mr Timothy Edwards
Fr Damian Howard SJ (Chair)
Mrs Joan Lim
Fr Keith McMillan SJ
Fr Paul Nicholson SJ
Fr Christopher Pedley SJ
Br Geoff te Braake SJ

Safeguarding Commission

In 2021 a number of reforms were introduced to safeguarding across the Catholic Church in England and Wales. These were implemented in response to the report of the Independent Inquiry into Child Sexual Abuse (IICSA) and also to the independent report commissioned by the Bishops' Conference of England and Wales produced by Ian Elliott. Both reports were produced in November 2020.

Among the recommendations accepted in full, an advisory framework has been replaced with one based on compliance with eight standards. Regulation of compliance will be

through all Church bodies contracting with the Catholic Safeguarding Standards Agency (CSSA) established as a regulatory function for the Church. The CSSA was launched in April 2021 and operates at arm's length from Church authorities and is governed by an independent board comprising of professionals of standing. In addition, the Religious Life Safeguarding Service (RLSS) was established in October 2021 to take over from the safeguarding teams in dioceses with the task of supporting religious orders, congregations and institutes in the fulfilment of their safeguarding responsibilities and developing their compliance with the new standards framework. A National Tribunal Service is also being established to undertake canonical investigations and hearings which have hitherto been conducted by the Vatican in Rome.

The Elliott Report also recommended that the current independent safeguarding commissions established in all of the dioceses and in a small number of religious bodies (including the Jesuits in Britain) be replaced with safeguarding sub-committees of the Board of Trustees or equivalent governing body. One reason for this change is to comply with a requirement of the Charity Commission so as to bring safeguarding into the regular business of the trustees. This was enacted in 2021. The Independent Safeguarding Commission for the Province held its final meeting at the end of June 2021.

The new standards require trustees to produce a three-year Safeguarding Plan which is annually reviewed and for this to be published.

In July 2021 the trustees established the Trustees' Safeguarding Committee (TSC), which then held its inaugural meeting in December 2021. Mr James Reilly was appointed as its Chair. The members of the TSC are:

Mr James Reilly, Chair
(from July 2021)
Background: Leadership in Social Services, health and charities.

Fr Brendan Callaghan SJ
Background: Ministry and clinical psychology

Ms Fiona Bateman
Background: Lawyer safeguarding expertise and independent chair of LA Safeguarding Boards

Mr Jim Gallagher
Background: Policy and Civil Service

Fr David Smolira SJ
Background: Trustee Safeguarding Lead, Ministry and social work

In 2022 a further two to three committee members will be recruited.

Following the retirement of the Province safeguarding coordinator, a review of Province safeguarding staffing requirements was completed resulting in the establishment of two part-time roles: a Safeguarding and Personal Conduct Manager and a Safeguarding Support Advisor with recruitment undertaken over the summer of 2021.

In 2021 training events covered the following topics: updated knowledge of current context of safeguarding; increased competence in dealing with safeguarding concerns; raising confidence in decision making in responding to safeguarding concerns; sharing concerns and complying with mandatory reporting; providing guidance on the use of social media in accordance with the Province guidance *Being Jesuit Online* and national statutory guidance.

Historical safeguarding records (in paper-based files) continue to be uploaded into the CPOMS electronic record keeping system (installed in 2020). This will enable ease of access and cross-referencing making investigations and supporting statutory or police requests more efficient.

Health and Safety Committee

An internal committee, consisting of Jesuits and staff members has been formed to provide a forum for consultation and discussion of fire and health and safety matters within the Charity. One of the aims of the

committee is to promote a culture of awareness of health and safety and of continuing improvement.

Much of the work in the latter half of the year was to monitor and review the response of the various Works of the Province to the COVID-19 pandemic.

Its current members are:

Mr Timothy Edwards
Fr Keith McMillan SJ (Chair)
Ms Brenda Micallef
Ms Sue Rumble
Mr Alec Thorp
Br Ken Vance SJ

The meetings are also attended by representatives of PIB Risk Management.

Risk Advisory Committee

The principal roles of the Risk Advisory Committee are to keep the trustees, who retain overall responsibility for risk management, informed of their understanding of the major risks facing the Charity and the adequacy of their response to those risks. As part of this they will make various recommendations concerning the risk register.

Its current members are:

Mr Anthony Carey
Mr Timothy Edwards
Mr Julian Gizzi
Fr Kensy Joseph SJ
Fr Keith McMillan SJ (Chair)
Br Stephen Power SJ
Mr Craig Walton

Risk Management

The trustees face numerous risks, both on a day-to-day basis and over the longer term. These risks relate to an uncertain event or set of events which, should it or if they occur, would have an effect on the achievement of the Charity's objectives. Risk not only refers to threats (i.e. damaging events which could lead to failure to achieve objectives and potentially have negative impacts), but also to opportunities (i.e. challenges, which, if exploited, could offer an improved way of achieving the desired objectives). Risk exists as

a consequence of uncertainty and is present in all activities whatever the size or complexity of the organisation and whichever sector it operates in.

Trustees consider risk management to be fundamental to good management practice and a significant aspect of corporate governance. Effective management of risk will provide an essential contribution towards the achievement of the Charity's strategic and operational objectives and goals.

As such, the trustees have adopted a risk policy that requires, among other things, the trustees to review at least annually the principal risks and uncertainties it considers the Charity to be exposed to. The identified risks are grouped into a number of categories including governance or management, operational, financial, environmental and external factors or legal and regulatory compliance. Each risk is assessed as to its impact and probability of occurring and given a score, which when combined is compared against a traffic light system with efforts being concentrated on any that show up as 'red'. The review of risks includes ensuring that procedures are in place and are being followed, putting in place a consistent basis of measurement, controlling, monitoring and reporting risk, ensuring the effectiveness of the procedures and considering an adequate response (including action to be taken to tackle the identified risks). The aim is not to eliminate risk altogether, but rather to ensure that every effort is made to manage risk appropriately.

This piece of work has identified a number of key risks and uncertainties as follows, along with ways in which they are mitigated. The top five risks are considered to be:

- Effective governance and leadership of the Charity, which combines a religious order with various charitable aims, increasingly carried out by lay staff members, necessitated by the falling numbers of Jesuits coming through formation, combined with the ageing of existing Jesuits. A Vocations Promoter, together with young adult spirituality events, help young adults discern whether they might have a religious vocation, including one within the Society of Jesus. The MAGIS@ Home Community is dedicated to welcoming young adults and helping them to engage in caring for our common home, following the teaching of Pope Francis' 2015 encyclical, *Laudato Si'*. In 2021 a further house was opened. The Jesuit Institute has started to introduce an induction and development programme designed to give all volunteers and staff a basic and easily accessible introduction to Jesuit values and to Ignatian Spirituality. Trustees are also actively looking at changing the Charity's governance structure through use of a CIO (Charitable Incorporated Organisation), which would allow the appointment of lay trustees and inject additional advice and expertise.
- Safeguarding issues, including the care of all staff members. We had a lead role in establishing the Religious Life Safeguarding Service (RLSS), set up as part of the reorganisation of safeguarding in the Catholic Church in England and Wales following the Elliott Report and the Report of the Independent Inquiry into Child Sexual Abuse (IICSA). As part of the recommendations being made, the Safeguarding Commission was replaced by a Safeguarding Committee reporting directly to the trustees and holding trustees to account in respect of children (those under age 18) and adults considered to be at risk of abuse. There is now an independent body to consider the care of its own staff. The Charity remains committed to being a Living Wage Foundation employer.
- Ongoing property commitments, especially in relation to becoming more environmentally sustainable and in particular achieving net carbon zero in the next few years. Many of the buildings we occupy, including churches and schools are ageing, while several are listed. It is recognised that any work being considered on these properties will have to allow for what may be very costly decarbonisation overlays. The trustees have started to measure their carbon footprint (Scopes 1, 2 and 3) and to develop a credible strategy and programme to transition to net carbon zero.
- Technology and data protection risks, including cyber-risks such as malware, password theft, traffic interception and phishing attacks all of which require constant vigilance and monitoring, especially in light of ever-changing technology advances. Changes in working practices requiring remote access have also increased the risks of fraudulent activity and have made it even more important to maintain strong financial and IT controls.
- Changes in the educational sector, especially in relation to what may prove to be the inevitable formation of academies and the falling numbers of pupils in several independent schools. Discussions are ongoing with the relevant Catholic dioceses in respect of the Jesuit VA schools, while strategies are being developed to increase the number of pupils.

Equal Opportunities

The Charity is committed to maintaining an equal opportunities and dignity at work policy for recruitment and employment. It respects the provisions against discrimination laid down by law and in the Catechism of the Catholic Church. No person will be discriminated against on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race (including colour, nationality and ethnic or national origins), religion or belief, sex and/or sexual orientation, allowing for what is justified by law or by the practices, rites, doctrines or ethos of the Roman Catholic Church.

In particular, the Jesuits in Britain avoid unlawful discrimination in all aspects of employment including recruitment and selection, promotion, transfer, opportunities for training, pay and benefits, other terms of employment, discipline, and selection for redundancy and dismissal.

Gender Pay

As a large charity, the Jesuits in Britain is required to publish information each year (based on April data), comparing what it pays to its male employees and its female employees. In April 2021, there were 338 employees, of which 93 were male (28%) and 245 were female (72%). The findings were that the average pay for men was £19.29 per hour compared to the average pay for women which was £18.23 per hour, a differential of 5.5% in favour of men. This compares to the previous year when the average male salary was above the average female salary by 5.8%.

There are flaws in this measure given that the data is not on a job like-for-like basis. As the data is also skewed by there being so many more women than men, the data remains of questionable benefit and quality. Nevertheless, it is an indicator and one that the Charity needs to keep under review (by repeating the exercise every year). If action is considered necessary, it will be taken.

The other main finding was that the middle-placed (median) man is paid £16.56 per hour some 3.2 % more than the middle-placed woman, who was paid £16.03.

Other Pay

The Charity is an accredited Living Wage Foundation employer. The Living Wage campaign is based on a simple idea, i.e. that a hard day's work deserves a fair day's pay. We are pleased to be one of many responsible employers who choose to pay a real Living Wage based on the cost of living, not just the so-called government National Living Wage minimum, which is set at a lower amount. The London Living Wage Foundation rate at the end of the financial year was £10.75 per hour compared to the government minimum of £8.21, a difference in rate of £2.54 per hour, or over 30% of the government minimum. The trustees recognise that in low paid sectors a vicious cycle of high levels of staff turnover and absenteeism can drive problems of operational inefficiency, low standards and weak productivity. Organisations that pay the Living Wage

have reported significant improvements in quality of work, reductions in staff absence and turnover, improved relationships between managers and their staff, and a stronger corporate reputation.

On limited information, as data is not easily available, we continue to monitor the ratio between the highest paid employee and our lowest paid employee. This seems to be about 6:1, which compares favourably with other charities. In the UK's top 100 companies, according to the Equality Trust, CEOs pocket on average 386 times that of a worker earning the National Living Wage, an eye-watering disparity.

Key Personnel and Senior Staff

The Charity offers fair pay to attract and keep appropriately qualified and experienced staff with the necessary skills required to lead, manage, support and deliver the Charity's aims. Key personnel are appointed as Directors of Work for a number of our Works, including the Heads of the two Preparatory schools, Donhead and St John's Beaumont, our Spirituality Centres, Jesuit Missions, the Jesuit Refugee Service and the *Laudato Si'* Research Institute, Campion Hall, along with the Director of Finance. The total remuneration, including all employer-related costs of the ten individuals involved, including Jesuits was £743k for the year ended 30 September 2021 [2019-2020 £691k].

Public Benefit

Public benefit is achieved in a variety of ways, as can be seen in earlier reports. This includes, but is not limited to, the following:

- Service of parishes
- Operation of schools and colleges of higher education; and provision of bursaries in the independent schools
- Provision of university chaplaincy services
- Social justice and the relief of poverty, working with the marginalised including the operation of the Jesuit Refugee Service

- Operation of Spirituality Centres, programmes and publications for spiritual education and other publishing and media (including free online resources); and
- The work of Jesuits worldwide.

We have developed our plans to ensure that we continue to deliver public benefit and achieve our objectives set out in the Deeds and Declarations of Trust (listed above in Organisational Structure – Constitution). The trustees confirm that they have complied with the duty of the Charities Act 2011 and the Charities Act Scotland 2005 to have due regard to the Charity Commission's and OSCR's general guidance on public benefit.

Volunteers

The work of the Jesuits in Britain would not be possible without the contribution of volunteers. Several of our Works have management boards or editorial boards comprising expert lay people, who give their time to advise and support our Jesuit and lay staff at regular meetings throughout the year. Our Investment Committee, Safeguarding Commission and Risk Advisory Committee have all recruited expert members who also generously give their time to support our mission.

The role of volunteers is especially important in two of our main Works, namely the Jesuit Refugee Service and Jesuit Missions. Their contribution is highlighted elsewhere in this report. Other Jesuit Works, too, benefit from volunteer time, including, for example, our Archives Department.

Our parishes too rely heavily on volunteers to assist in many ways, from serving and reading at Mass to fundraising, finance and committees. Larger parishes have around 200 volunteers, smaller ones around 25.

The work carried out across the Charity also includes the efforts of the 100 plus Jesuits, although some are no longer in active ministry. Nevertheless, they continue to pray for the work of the Society. The Jesuits themselves take a vow of poverty so they personally take no salaries, royalties, fees or any

other remuneration. Jesuits work as parish priests, chaplains, teachers, academics, writers, doctors, spiritual directors and artists. Any remuneration received is Gift Aided to the Charity to further the work it does. Members receive in return only enough to live on and are looked after when they

become sick, elderly or infirm. The value of work done on behalf of the Charity is considerable and might be conservatively estimated at about £6m in any “normal” year. The value of the work of others (i.e. non-Jesuit volunteers) is also significant with many working in the service of their parishes,

the work of the Jesuit Refugee Service, as members of Management Boards and various committees, etc. A conservative estimate of this would be £0.5m to make a total of £6.5m, again in a normal (non-pandemic) year. If included in the accounts, this would add approximately 20% to the total income of the charity.

Statement of the Trustees’ Responsibilities

The trustees are responsible for preparing the trustees’ report and the accounts in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England, Wales and in Scotland requires the trustees to prepare accounts for each financial year which give a true and fair view of the state of affairs of the Charity and of the income and expenditure of the Charity for that period. In preparing these accounts, the trustees are required to:

- select suitable accounting policies and then apply them consistently
- observe the methods and principles in 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 Republic of Ireland (FRS 102)

- make judgements and estimates that are reasonable and prudent
- state whether applicable United Kingdom Accounting Standards have been followed, subject to any material departures disclosed and explained in the accounts, and
- prepare the accounts 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 that disclose with reasonable accuracy at any time the financial position of the

Charity and enable them to ensure that the accounts comply with the Charities Act 2011, applicable Charity (Accounts and Reports) Regulations, the Charities and Trustee Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 and the provisions of the Charity’s trust deeds. They are also responsible for safeguarding the assets of the Charity and for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity’s website. Legislation in the United Kingdom governing the preparation and dissemination of accounts may differ from legislation in other jurisdictions.

Signed for and on behalf of Trustees for Roman Catholic Purposes Registered



D Howard SJ
Provincial

Approved on 14th May 2022

Independent auditor's report to the Trustees of The Society of Jesus Trust of 1929 for Roman Catholic Purposes

*(incorporating The Society of Jesus Trust of 1921,
The Society of Jesus Charitable Trust, the Young Priests' Fund,
Beaumont Educational Trust and the von Hugel Charity)*

Opinion

We have audited the accounts of the Society of Jesus Trust of 1929 for Roman Catholic Purposes (incorporating The Society of Jesus Trust of 1921, The Society of Jesus Charitable Trust, The Young Priests' Fund, Beaumont Educational Trust and the von Hugel Charity) (collectively referred to as 'the Charity') for the year ended 30 September 2021 which comprise the statement of financial activities, the balance sheet, the statement of cash flows, principal accounting policies and the notes to the accounts. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the accounts:

- give a true and fair view of the state of the Charity's affairs as at 30 September 2021 and of its income and expenditure for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Charities Act 2011, the Charities and Trustee Investment (Scotland) Act 2005 and regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended).

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the auditor's responsibilities for the audit of the accounts section of our report. We are independent of the Charity in accordance with the ethical requirements that are relevant to our audit of the accounts in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the accounts, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the accounts is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the Charity's ability to continue as a going concern for a period of at least twelve months from when the accounts are authorised for issue.

Our responsibilities and the responsibilities of the trustees with respect to going concern are described in the relevant sections of this report.

Other information

The trustees are responsible for the other information. The other information comprises the information included in the annual report and accounts, other than the accounts and our auditor's report thereon. Our opinion on the accounts does not cover the other information and we do not express any form of assurance conclusion thereon.

In connection with our audit of the accounts, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the accounts or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the accounts or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Matters on which we are required to report by exception

We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 and the Charities Accounts (Scotland) Regulations 2006 (as amended) requires us to report to you if, in our opinion:

- the information given in the trustees' annual report is inconsistent in any material respect with the accounts; or
- sufficient and proper accounting records have not been kept; or
- the accounts are not in agreement with the accounting records and returns; or
- we have not received all the information and explanations we require for our audit.

Responsibilities of trustees for the accounts

As explained more fully in the trustees' responsibilities statement, the trustees are responsible for the preparation of the accounts and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of accounts that are free from material misstatement, whether due to fraud or error.

In preparing the accounts, the trustees are responsible for assessing the Charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the Charity or to cease operations, or have no realistic alternative but to do so.

Auditor's responsibilities for the audit of the accounts

Our objectives are to obtain reasonable assurance about whether the accounts as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these accounts.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below.

Our approach to identifying and assessing the risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, was as follows:

- the engagement partner ensured that the engagement team collectively had the appropriate competence, capabilities and skills to identify or recognise non-compliance with applicable laws and regulations; and
- we obtained an understanding of the legal and regulatory frameworks that are applicable to the Charity and determined that the most significant frameworks which are directly relevant to specific assertions in the financial statements are those that relate to the reporting framework (Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and the Charities Act 2011, the Charities and Trustee Investment (Scotland) Act 2005, regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended)) and those that relate to data protection (General Data Protection Regulation), education legislation (including the Children's Act) and safeguarding regulations;
- we understood how the Charity is complying with those legal and regulatory frameworks by making enquiries of management and those responsible for legal and compliance procedures. We corroborated our enquiries through our review of the minutes of trustees' meetings and reports from regulatory bodies.

We assessed the susceptibility of the Charity's financial statements to material misstatement, including obtaining an understanding of how fraud might occur. Audit procedures performed by the engagement team included:

- identifying and assessing the design effectiveness of controls in place to prevent and detect fraud;
- understanding how those charged with governance considered and addressed the potential for override of controls or other inappropriate influence over the financial reporting process;
- challenging assumptions and judgements made by management in its significant accounting estimates;
- identifying and testing journal entries;
- reviewing the aggregation procedure for the Charity's component institutions;
- reviewing the control procedures at a sample of the Charity's component institutions;
- assessing the extent of compliance with the relevant laws and regulations as part of our procedures on the relevant accounts item to which they relate.

To address the risk of fraud through management bias and override of controls, we:

- performed analytical procedures to identify any unusual or unexpected relationships;
- performed substantive testing on expenditure; and
- tested journal entries to identify unusual transactions.

In response to the risk of irregularities and non-compliance with laws and regulations, we designed procedures which included, but were not limited to:

- reading the minutes of meetings of those charged with governance; and
- enquiring of management as to actual and potential litigation and claims.

There are inherent limitations in our audit procedures described above. The more removed that laws and regulations are from financial transactions, the less likely it is that we would become aware

of non-compliance. Auditing standards also limit the audit procedures required to identify non-compliance with laws and regulations to enquiry of the trustees and other management and the inspection of regulatory and legal correspondence, if any.

Material misstatements that arise due to fraud can be harder to detect than those that arise from error as they may involve deliberate concealment or collusion.

A further description of our responsibilities for the audit of the accounts is located on the Financial Reporting Council's website at www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the Charity's trustees, as a body, in accordance with section 144 of the Charities Act 2011 and with regulations made under section 154 of that Act, and section 44(1)(c) of the Charities and Trustee Investment (Scotland) Act 2005 and Regulation 10 of the Charities Accounts (Scotland) Regulations 2006. Our audit work has been undertaken so that we might state to the Charity's trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to

anyone other than the Charity and the Charity's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

Buzzacott LLP

Buzzacott LLP
Statutory Auditor
130 Wood Street
London
EC2V 6DL

Buzzacott LLP is eligible to act as an auditor in terms of section 1212 of the Companies Act 2006

Financial statements

Statement of financial activities – Year to 30 September 2021

	Note	Unrestricted Funds 2021 £'000	Restricted Funds 2021 £'000	Total 2021 £'000	Total 2020 £'000
Income from:					
Donations and legacies	1	3,755	1,821	5,576	5,775
Charitable activities:					
School fees and other educational income	2	9,035	(13)	9,022	8,978
Other trading activities:					
Trading income	3	67	-	67	114
Other activities for generating funds	4	88	4	92	3,612
Investments	5	6,683	3,320	10,003	10,248
Other	6	398	-	398	402
Total income		20,026	5,132	25,158	29,129
Expenditure on:					
Raising funds	7	3,183	58	3,241	2,756
Charitable activities:	8				
Parish ministry		798	-	798	553
Education		12,646	277	12,923	13,740
Formation		2,929	2,086	5,015	5,344
Social justice and the relief of poverty		1,560	-	1,560	1,301
Care of infirm and elderly members		3,152	-	3,152	3,257
Spirituality		2,344	-	2,344	2,855
Work worldwide		369	3,506	3,875	3,691
Total expenditure		26,981	5,927	32,908	33,497
Net expenditure before gains on investments		(6,955)	(795)	(7,750)	(4,368)
Net gains on investments	13	68,662	21,276	89,938	35,147
Net income		61,707	20,481	82,188	30,779
Transfers between funds	18	89,900	(89,900)	-	-
Net movement in funds		151,607	(69,419)	82,188	30,779
Reconciliation of funds:					
Total funds brought forward		523,483	152,953	676,436	645,657
Total funds carried forward		675,090	83,534	758,624	676,436

The accompanying notes form part of these accounts.

Details of comparative figures by fund are disclosed in note 27.

All of the Charity's activities derived from continuing operations during the above two financial periods.

All recognised gains and losses are included in the above statement of financial activities.

Balance Sheet – as at 30 September 2021

	Note	2021 £'000	2021 £'000	2020 £'000	2020 £'000
Fixed assets:					
Tangible assets	11		76,227		73,471
Investments	13		658,321		569,284
Total fixed assets			734,548		642,755
Current assets:					
Stocks		26		40	
Debtors:					
Amounts falling due after more than one year	14	5,379		3,476	
Amounts falling due within one year	14	1,978		5,410	
		7,357		8,886	
Short-term deposits	15	29,876		37,595	
Cash at bank and in hand		9,898		17,241	
Total current assets		47,157		63,762	
Liabilities:					
Creditors: Amounts falling due within one year	16	(22,157)		(28,491)	
Net current assets			25,000		35,271
Total assets less current liabilities			759,548		678,026
Creditors: Amounts falling due after more than one year	17		(924)		(1,590)
Total net assets			758,624		676,436
Funds of the Charity:					
Restricted funds	18		83,534		152,953
Unrestricted funds:	19				
General fund		5,220		6,504	
Designated funds	20	669,870		516,979	
Total unrestricted funds			675,090		523,483
Total Charity funds			758,624		676,436

Approved by and authorised for issue and signed on behalf of Trustees for Roman Catholic Purposes Registered:



K McMillan SJ

Trustee

Approved on: 14th May 2022

The accompanying notes form part of these accounts.

Cash Flow Statement – Year to 30 September 2021

	Note	2021 £'000	2020 £'000
Cash flows from operating activities:			
Net cash outflow used in operating activities	A	(26,391)	(21,619)
Cash flows from investing activities:			
Investment income received		10,003	10,248
Payments to acquire tangible fixed assets		(4,454)	(256)
Payments to acquire fixed asset investments		(217,161)	(205,812)
Receipts from the disposal of fixed asset investments		228,807	199,645
Net cash inflow provided by investing activities		17,195	3,825
Cash flows from financing activities:			
Loan interest paid		(25)	(36)
Loan repayments		(584)	(163)
Net cash outflow from financing activities		(609)	(199)
Decrease in cash and cash equivalents		(9,805)	(17,993)
Cash and cash equivalents at 1 October	B	64,619	82,612
Cash and cash equivalents at 30 September	B	54,814	64,619

A Reconciliation of net income to net cash outflow used in operating activities

	2021 £'000	2020 £'000
Net income for the reporting period	82,188	30,779
Adjustments for:		
Depreciation charge	1,698	1,627
Interest expense	25	36
Investment income receivable	(10,003)	(10,248)
Net gains on investments	(89,938)	(35,147)
Decrease/(increase) in stocks	14	(4)
Decrease/(increase) in debtors	1,529	(3,965)
Decrease in creditors	(11,904)	(4,697)
Net cash inflow/(outflow) from operating activities	(26,391)	(21,619)

B Analysis of changes in net debt

	At 1 Oct 2020 £'000	Cash Flow £'000	Other non- cash changes £'000	At 30 Sept 2021 £'000
Cash and cash equivalents				
Cash at bank and in hand	17,241	(7,343)	-	9,898
Cash held with investment managers	9,783	5,257	-	15,040
Short-term deposits	37,595	(7,719)	-	29,876
	64,619	(9,805)	-	54,814
Borrowings				
Bank loans due within one year	(195)	195	(220)	(220)
Bank loans due after more than one year	(1,180)	389	220	(571)
	63,244	(9,221)	-	54,023

Principal accounting policies

Basis of preparation

The financial statements have been prepared in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (Charity SORP FRS 102) – 2nd edition effective 1 January 2019. The Charity constitutes a public benefit entity as defined by FRS 102.

The functional currency of the Charity is considered to be Pounds Sterling (GBP), being the currency of the primary economic environment in which the Charity operates. The numbers are rounded to the nearest thousand pounds.

Basis of consolidation

The results of the Charity's trading subsidiary, as set out in note 3, are incorporated directly into the Charity's accounts. This is a departure from the consolidation approach required by Charity SORP, however it is immaterial in the view of the trustees.

Going concern

The trustees have assessed whether the use of the going concern assumption is appropriate in preparing these accounts. The trustees have made this assessment in respect to a period of at least one year from the date of approval of these accounts.

Having reviewed the funding facilities available to the Charity together with the Charity's future projected cash flows, the trustees have an expectation that the Charity has adequate resources to continue its activities for the foreseeable future and consider that there were no material uncertainties related to events or conditions that may cast significant doubt over the Charity's financial viability. Accordingly, they also continue to adopt the going concern basis in preparing the financial statements as outlined in the trustees' responsibilities statement.

Critical accounting judgements and key sources of estimation uncertainty

In the application of the accounting policies, trustees are required to make judgements, estimates, and assumptions about the carrying value of assets and liabilities that are not readily apparent from other sources. The estimates and underlying assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period, or in the period of the revision and future periods if the revision affected current and future periods.

Judgements made by the trustees in the application of these principal accounting policies that have a significant effect on the financial statements and estimates with a significant risk of material adjustment in the next year are deemed to be in relation to the following:

- ascribing fair values to the Charity's investment properties. The fair values have been based on the estimated open market values which have been determined with professional assistance;
- estimating the apportionment of the historic cost of tangible fixed asset properties between the land and the building elements;
- estimating of the useful economic lives attributed to tangible fixed assets for the purpose of determining the annual depreciation charge;
- the judgements made in determining whether debts are recoverable, and the value of any provisions needed against slow or non-payment;
- determining the apportionment of expenditure between governance and support costs and between support costs and the various categories of expenditure on charitable activities;

- determining the value of designated funds needed at the year end, in particular the assumptions made in determining the value of the Old Age Fund; and
- estimating future income and expenditure flows for the purpose of assessing going concern.

In the view of the trustees, no assumptions concerning the future or estimation uncertainty affecting assets or liabilities at the balance sheet date are likely to result in a material adjustment to their carrying amounts in the next financial year.

Scope

The accounts generally do not include the operating accounts of parish churches in the charge of the Society of Jesus as these are deemed to be managed as part of the relevant Diocesan charity.

In the same way, the operating accounts of voluntary aided schools do not form part of these accounts. However, the trustees are the legal owners of land and buildings used exclusively by such schools and, therefore, these assets are reflected within the Charity's accounts.

Both Donhead and St John's Beaumont schools have year ends of 31 August in line with the academic year. No adjustment is made to the figures of these schools as part of the aggregation process to reflect this non-coterminous financial reporting date as any amendment necessary is deemed to be immaterial to the Charity's accounts.

Income

Income is recognised in the period in which the Charity has entitlement to the income, the amount of income can be measured reliably and it is probable that the income will be received.

Income comprises donations and legacies, income from charitable activities, income from trading activities, investment income and interest receivable, and other income.

Donations, including salaries and pensions of individual religious received under deed of covenant, are recognised when the Charity has confirmation of both the amount and settlement date. In the event of donations pledged but not received, the amount is accrued for where the receipt is considered probable. In the event that a donation is subject to conditions that require a level of performance before the Charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those conditions is wholly within the control of the Charity and it is probable that those conditions will be fulfilled in the reporting period.

Performance related grants receivable are recognised when the Charity has confirmation of both the amount and the settlement date and are credited to the statement of financial activities based on level of performance achieved.

In accordance with the Charities SORP FRS 102 volunteer time is not recognised.

Legacies are included in the statement of financial activities when the Charity is entitled to the legacy, the executors have established that there are sufficient surplus assets in the estate to pay the legacy, and any conditions attached to the legacy are within the control of the Charity.

Entitlement is taken as the earlier of the date on which either: the Charity is aware that probate has been granted, the estate has been finalised and notification has been made by the executor to the Charity that a distribution will be made, or when a distribution is received from the estate. Receipt of a legacy, in whole or in part, is only considered probable when the amount can be measured reliably and the Charity has been notified of the executor's intention to make a distribution. Where legacies have been notified to the Charity, or the Charity is aware of the granting of probate, but the criteria for income recognition have not been met, then the legacy is treated as a contingent asset and disclosed if material. In the event that the gift is in the form of an asset other than cash or a financial asset traded on a recognised stock exchange, recognition is subject to the value of the gift being reliably measurable with a degree of reasonable accuracy and the title of the asset having being transferred to the Charity.

Investment income from listed investments is recognised once the dividend has been declared and notification has been received of the dividend due.

Investment income from property rental is recognised once the rent is payable under the relevant lease or tenancy agreement less any provision necessary for doubtful recovery.

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the Charity; this is normally upon notification of the interest paid or payable by the bank.

Income derived from school fees and other educational charges is measured at the fair value of the consideration receivable and is stated net of bursaries and scholarships.

Any surplus on the disposal of tangible fixed assets is calculated as the difference between the sale proceeds net of sale costs and the net book value of the asset immediately prior to disposal. It is accounted for once legal completion of the disposal has taken place.

Funding from the Coronavirus Job Retention Scheme is credited to the statement of financial activities when the Charity becomes entitled to the monies and when the amount receivable has been quantified.

All other income is measured at fair value and accounted for on an accruals basis.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the Charity to make a payment to a third party, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably.

All expenditure is accounted for on an accruals basis. Expenditure comprises direct costs and support costs. All expenses, including support costs, are allocated or apportioned to the applicable expenditure headings.

Expenditure comprises the following:

- a. The cost of raising funds includes the expenses of the trading company, financing costs, fundraising costs, the fees payable to investment managers in connection with the management of the Charity's listed investments, and the fees payable to property managers in connection with the management of the Charity's investment properties.

- b. The costs of charitable activities comprise expenditure on the Charity's primary charitable purposes as described in the trustees' report.
- c. Grants in support of Jesuit foundations and projects are included in the statement of financial activities when approved and when the intended recipient has either received the funds or been informed of the decision to make the grant and has satisfied all related conditions. Grants approved but not paid at the end of the financial year are accrued for. Grants where the beneficiary has not been informed or has to meet certain conditions before the grant is released are not accrued for but are noted as financial commitments in the notes to the accounts.

Support costs (including governance costs) are apportioned based on the proportion of direct costs for each category.

Governance costs comprise expenditure that is directly attributable to the necessary procedures for compliance with constitutional and statutory requirements.

Employee benefits

Short-term benefits including holiday pay are recognised as an expense in the period in which the service is received.

Employee termination benefits are accounted for on an accrual basis and in line with FRS 102.

Foreign currencies

Monetary assets and liabilities in foreign currencies are translated into sterling at the rates of exchange ruling at the balance sheet date. Transactions in foreign currencies are translated into sterling at the rate of exchange ruling at the date of the transaction. Exchange differences are taken into account in arriving at the net movement in funds.

Tangible fixed assets (other than Churches and Schools)

All assets costing more than £2,500 and with an expected life exceeding one year are capitalised.

- Land and buildings: The original purchase price of land and buildings is apportioned 50:50 to reflect the cost of the land and the cost of the buildings. Given the nature of the Charity's properties and their locations, the trustees are of the opinion that such a split is both

appropriate and reasonable. The building element is depreciated over 50 years on a straight-line basis. No depreciation is charged on the land element.

- Vehicles and equipment: Vehicles and equipment are stated at cost less a provision for depreciation. Depreciation is provided on cost over the following periods in order to write off each asset over its estimated useful life:
Equipment 4 years straight line
Vehicles 4 years straight line

Assets in the course of construction are not depreciated until the asset is brought into its intended use.

Churches and schools

The churches have belonged to the Charity for many years and details of their original cost are not available. All are functioning churches, and as such are neither readily marketable nor can be reliably valued. They are excluded from the balance sheet, as permitted by Charity SORP.

Historical assets

The Charity also holds works of art, book collections, and religious artefacts which currently serve the work of the Charity, but which have been excluded from the balance sheet. A market valuation for such assets is uncertain and, in any case, available only at an expense that appears to the trustees to be out of proportion to any enhancement of the disclosure properly required in these accounts.

Investments

Listed investments are a form of basic financial instrument and are initially recognised at their transaction value and subsequently measured at their fair value as at the balance sheet date using the quoted bid price.

One of the main forms of financial risk faced by the Charity is that of volatility in equity markets and investment markets due to wider economic conditions, the attitude of investors to investment risk, and changes in sentiment concerning equities and within particular sectors or sub-sectors.

Investment properties are included in the accounts at their fair value which is deemed to equate to their open market value. Investment properties are revalued at an open market value annually on 30 September by chartered surveyors.

Realised gains (or losses) on investment assets are calculated as the difference between disposal proceeds and their

opening carrying value or their purchase value if acquired subsequent to the first day of the financial year. Unrealised gains and losses are calculated as the difference between the fair value at the year end and their carrying value at that date. Realised and unrealised investment gains (or losses) are combined in the statement of financial activities and are credited (or debited) in the year in which they arise.

Stock

Stock is measured at the lower of cost and net realisable value.

Debtors

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due. They have been discounted to the present value of the future cash receipts where the affect of discounting is material.

Short-term deposits

Short-term deposits require at least one day's notice to be withdrawn without penalty.

Cash at bank and in hand

Cash at bank and cash in hand includes cash and short-term highly liquid investments.

Cash placed on deposit for a period of more than one day but less than one year is classified as short-term deposits. Cash placed on deposit for a period exceeding one year is classified as a fixed asset investment.

Creditors and provisions

Creditors and provisions are recognised where the Charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due. They have been discounted to the present value of the future cash payments where the affect of discounting is material.

Pension costs

Contributions to employees' personal pension defined contribution schemes are recognised in the statement of financial activities in the year in which they are payable to the scheme.

The Charity's independent schools make contributions to the Teachers' Pension Scheme, which is a defined benefit scheme. The scheme is a multi-employer pension scheme and it is not possible to identify the assets and liabilities of the scheme which are attributable to the Charity.

Therefore, the Teachers' Pensions Scheme is treated as a defined contribution scheme for accounting purposes and the employer contributions are recognised as expenditure in the period to which they relate.

Fund accounting

The restricted funds are monies raised for, and their use restricted to, a specific purpose, or donations subject to donor imposed conditions.

The designated funds are monies set aside out of general funds and designated for specific purposes by the trustees.

The general fund comprises those monies which may be used towards meeting the charitable objectives of the Society at the discretion of the trustees.

Financial instruments

Basic financial instruments are initially recognised at transaction value and subsequently measured at amortised cost with the exception of investments which are held at fair value. Financial assets held at amortised cost comprise cash at bank and in hand, together with trade and other debtors. A specific provision is made for debts for which recoverability is in doubt. Cash at bank and in hand is defined as all cash held in instant access bank accounts and used as working capital. Financial liabilities held at amortised cost comprise all creditors except social security and other taxes and provisions.

Operating leases

Rentals applicable to operating leases where substantially all of the benefits and risks of ownership remain with the lessor are charged to the statement of financial activities on a straight-line basis over the lease term.

Services provided by members of the Order

For the purpose of these accounts, no monetary value has been placed on the administrative and other services provided to the Charity by the members of the Order.

I Donations and legacies

	Unrestricted Funds £'000	Restricted Funds £'000	Total 2021 £'000	Unrestricted Funds £'000	Restricted Funds £'000	Total 2020 £'000
Donations and gifts	1,030	1,322	2,352	1,001	836	1,837
Legacies	370	373	743	136	1,001	1,137
Grants received	1,314	111	1,425	1,261	356	1,617
Covenanted salaries and pensions (see below)	1,041	15	1,056	1,164	20	1,184
	3,755	1,821	5,576	3,562	2,213	5,775

Covenanted salaries and pensions represent salaries and pensions of members of the Society payable to the Trust under deeds of covenant or Gift Aid declarations.

Included within grants received is £206k (2020: £410k) in relation to the Government's Coronavirus Job Retention Scheme funding.

2 School fees and other educational income

	Unrestricted Funds £'000	Restricted Funds £'000	Total 2021 £'000	Total 2020 £'000
Gross school fees receivable	9,627	(13)	9,614	10,005
Less: Total bursaries, grants and other allocations	(700)	-	(700)	(1,105)
Net school fees receivable	8,927	(13)	8,914	8,900
School activities and trips	108	-	108	78
	9,035	(13)	9,022	8,978

3 Trading income

	Total 2021 £'000	Total 2020 £'000
Trading income	38	60
Income from trading subsidiary	29	54
	67	114

The Trust has one wholly owned trading subsidiary, St John's Beaumont Development Company Limited, which is incorporated in England and Wales (Registration number 03355298). This company exists principally to hire out the leisure and conference facilities at one of the Trust's two schools. A summary of its trading results is shown below. All income is unrestricted. The audited accounts are to be filed with the Registrar of Companies.

St John's Beaumont Development Company Limited	Total 2021 £'000	Total 2020 £'000
Turnover	36	54
Cost of sales	-	(1)
Gross profit	36	53
Administrative costs	(65)	(46)
Net (loss)/profit for the year	(29)	7
Gift Aid	-	(3)
Movement on profit and loss account	(29)	4

All profits generated by the company are Gift Aided to the Charity.

4 Other activities for generating funds

	Unrestricted Funds £'000	Restricted Funds £'000	Total 2021 £'000	Unrestricted Funds £'000	Restricted Funds £'000	Total 2020 £'000
Sale of publications	41	-	41	58	-	58
Lettings of functional properties	40	-	40	40	-	40
Miscellaneous	7	4	11	3,506	8	3,514
	88	4	92	3,604	8	3,612

5 Investment income

	Total 2021 £'000	Total 2020 £'000
Listed investments – equities		
UK	1,104	1,176
Europe	739	853
North America	3,339	3,017
Other	888	741
	6,070	5,787
Interest receivable	156	423
Rental income	2,005	2,193
Property funds	1,772	1,845
	10,003	10,248

All rental income is generated from investment properties within the United Kingdom and all interest is from United Kingdom loans and deposits. Property fund income represents dividends received from money held in Property Fund Income units.

6 Other income

	Total 2021 £'000	Total 2020 £'000
Other educational income	74	124
Sundry income	324	278
	398	402

7 Raising funds

	Unrestricted Funds £'000	Restricted Funds £'000	Total 2021 £'000	Total 2020 £'000
Trading expenses	88	20	108	82
Financing costs	98	(6)	92	248
Estate management fees	111	-	111	95
Premises costs for investment property	253	-	253	138
Investment management fees	2,358	-	2,358	1,913
Fundraising costs	172	27	199	228
Legal and professional fees	103	17	120	52
	3,183	58	3,241	2,756

8 Charitable activities

	Direct Costs £'000	Support Costs £'000	Grants £'000	Total 2021 £'000	Total 2020 £'000
Parish ministry	36	673	89	798	553
Education	5,540	6,490	893	12,923	13,740
Formation	-	1,237	3,778	5,015	5,344
Social justice and the relief of poverty	-	1,429	131	1,560	1,301
Care of infirm and elderly members	1,995	1,157	-	3,152	3,257
Spirituality	967	1,377	-	2,344	2,855
Work worldwide	1	841	3,033	3,875	3,691
	8,539	13,204	7,924	29,667	30,741
		note 8a	note 8b		

Prior year charitable activities

	Direct Costs £'000	Support Costs £'000	Grants £'000	Total 2020 £'000
Parish ministry	28	384	141	553
Education	5,379	7,691	670	13,740
Formation	-	1,587	3,757	5,344
Social justice and the relief of poverty	-	1,295	6	1,301
Care of infirm and elderly members	2,148	1,109	-	3,257
Spirituality	824	2,031	-	2,855
Work worldwide	272	387	3,032	3,691
	8,651	14,484	7,606	30,741
		note 8a	note 8b	

8a Support costs

	General Admin. £'000	Premises £'000	Other £'000	Total 2021 £'000	Total 2020 £'000
Parish ministry	162	511	-	673	384
Education	2,591	2,429	1,470	6,490	7,691
Formation	531	357	349	1,237	1,587
Social justice and the relief of poverty	231	175	1,023	1,429	1,295
Care of infirm and elderly members	756	401	-	1,157	1,109
Spirituality	478	531	368	1,377	2,031
Work worldwide	565	210	66	841	387
	5,314	4,614	3,276	13,204	14,484

Included within the cost of charitable activities are governance costs of £56,200 (2020: £64,658) which include auditor's fees of £30,400 (2020: £39,750) for the Trust, £18,870 (2020: £19,728) for the schools, and trustees' indemnity insurance premium of £6,930 (2020: £5,180).

Central costs (6%) which are not separately identifiable as belonging to a particular activity are allocated on a pro rata basis across the various charitable activities. Premises costs include building maintenance, insurance, utilities and depreciation. Costs relating to common buildings (25%) are allocated on a pro rata basis across the various charitable activities. Other costs including welfare and catering, are allocated directly to the activities for which they relate.

Prior year support costs

	General Admin. £'000	Premises £'000	Other £'000	Total 2020 £'000
Parish ministry	187	189	8	384
Education	2,816	3,788	1,087	7,691
Formation	352	320	915	1,587
Social justice and the relief of poverty	205	172	918	1,295
Care of infirm and elderly members	702	407	-	1,109
Spirituality	494	529	1,008	2,031
Work worldwide	248	139	-	387
	5,004	5,544	3,936	14,484

8b Grants

	£'000	Total 2021 £'000	£'000	Total 2020 £'000
Parish ministry				
Various Jesuit-led Parishes	89		141	
		89		141
Education				
Jesuit Voluntary Aided schools	232		620	
Other educational grants	661		50	
		893		670
Formation				
Worldwide Society	783		1,255	
Other Jesuit Provinces	571		1,089	
Blackfriars Studium	2,029		-	
Catholic Bishops' Conference of England and Wales	-		600	
St Mary's University, Mater Ecclesiae	-		583	
Other	395		230	
		3,778		3,757
Social justice and the relief of poverty				
Grants to groups and individuals	131		6	
		131		6
Work worldwide				
Zimbabwe Province, Society of Jesus	1,224		732	
Guyana Region, Society of Jesus	289		662	
South Africa Region, Society of Jesus	140		690	
Harare Diocese, Zimbabwe	217		119	
Other various grants overseas	1,163		829	
		3,033		3,032
Total grants payable		7,924		7,606

9 Staff costs and trustees' remuneration and costs

9a Staff costs

	Total 2021 £'000	Total 2020 £'000
Wages and salaries	9,171	9,152
Termination payments	23	5
Social security costs	873	830
Pension contributions	898	952
	10,965	10,939
Total employment costs of key management personnel (included above)	743	691
	2021 Number of employees	2020 Number of employees
Teaching staff	149	156
Administration and domestic staff	220	202
	369	358

The number of employees who earned £60,000 per annum or more (including taxable benefits but excluding employer's pension contributions) during the year was as follows:

	2021	2020
£60,001 - £70,000	5	5
£70,001 - £80,000	2	1
£80,001 - £90,000	1	1
£90,001 - £100,000	2	2
£100,000 - £110,000	1	1

Pension contributions are paid in respect of the eleven employees above, who are paid in excess of £60,000. In respect of four of the employees, contributions are made into the Teachers' Superannuation Scheme, a defined benefit scheme. In the case of the other seven employees, contributions are made into a defined contribution scheme. The total contributions made were £68,264 (2020: £74,630) into the Teachers' Superannuation Scheme and £36,199 (2020: £33,635) into the defined contribution scheme.

9b Trustees' remuneration and expenses

As members of the Society, the trustees' living and personal expenses during the year were borne by the Trust. There were no meeting expenses incurred this year (2020: Nil). No remuneration for services were paid to the trustees (2020: Nil).

With authority from the Charity Commission, the Trust has purchased insurance to protect the Trust from any loss arising from the neglect or defaults of its trustees, employees and agents and to indemnify the trustees or other officers against the consequences of any neglect or default on their part. The insurance premium paid by the charity during the year totalled £6,930 (2020: £5,180) and provides cover of up to a maximum of £5 million (2020: £5 million).

10 Taxation

The 1921 and 1929 Trusts of the Society of Jesus in Great Britain and the Society of Jesus Charitable Trust are registered charities and are not liable for income tax or capital gains tax on income and gains derived from their charitable activities, as they fall within the various exemptions available to registered charities.

11 Tangible fixed assets

	Freehold Functional Land and Buildings £'000	Vehicles and Equipment £'000	Total £'000
At cost or valuation			
At 1 October 2020	89,898	4,421	94,319
Additions at cost	4,086	368	4,454
Disposals	-	(16)	(16)
At 30 September 2021	93,984	4,773	98,757
Depreciation			
At 1 October 2020	17,965	2,883	20,848
Charge for the year	1,184	514	1,698
Disposals	-	(16)	(16)
At 30 September 2021	19,149	3,381	22,530
Net book value			
At 30 September 2021	74,835	1,392	76,227
At 30 September 2020	71,933	1,538	73,471

12 Churches and historical assets

The Trust is the legal owner of the following properties which are not valued for the purposes of these accounts.

Boscombe	Corpus Christi Church
Edinburgh	Sacred Heart Church
Mayfair, London	Farm Street Church
Manchester	Holy Name Church
Preston	St Wilfrid's Church, Presbytery and Parish Hall
Stamford Hill, London	St Ignatius Church
Wimbledon, London	Sacred Heart Church
Sheffield	Church of the Immaculate Conception (Spinkhill)
Hurst Green, Lancashire	St Peter's Church (Stonyhurst)

The churches have belonged to the Trust for many years and details of their original cost are not available. All are functioning churches and as such are neither readily marketable nor can be reliably valued and are therefore excluded from the balance sheet.

The Trust also holds works of art, book collections and religious artefacts which currently serve the work of the Trust, but which have been excluded from the balance sheet. A market valuation for such assets is uncertain and, in any case, available only at an expense that appears to the Trustees to be out of proportion to any enhancement of the disclosure properly required in these accounts.

13 Investments

	Listed Investments £'000	Investment Properties £'000	Total 2021 £'000	Total 2020 £'000
Market value at 1 October	512,884	46,617	559,501	518,187
Less: Disposal proceeds	(228,565)	(242)	(228,807)	(199,645)
Add: Additions at cost	213,966	3,195	217,161	205,812
Net investment gains	95,020	406	95,426	35,147
Market value at 30 September	593,305	49,976	643,281	559,501
Cash held by investment managers	15,040	-	15,040	9,783
	608,345	49,976	658,321	569,284

Investments held at 30 September comprised the following:

Listed investments		
Equities:		
UK	80,580	87,513
Europe	67,414	71,979
North America	309,724	253,277
Other	92,989	60,651
	550,707	473,420
Property Fund units	42,598	39,464
Market value of listed investments	593,305	512,884
UK investment properties	49,976	46,617
Cash balances held by investment managers	15,040	9,783
	658,321	569,284

14 Debtors

	Total 2021 £'000	Total 2020 £'000
Amounts falling due after more than one year		
Long-term loans (see below)	5,337	3,432
Other debtors	42	44
	5,379	3,476
Amount falling due within one year		
School fees and other educational services	50	8
Accrued investment income	6	75
Interest received on deferred payment	-	3,506
Prepayments and other accrued income	1,565	1,317
Other debtors	357	504
	1,978	5,410
Total debtors	7,357	8,886

14 Debtors (continued)

The terms of the loan to Mount St Mary's College (a school transferred to a separate trust in 2007) have been changed to give the school time to recover following the pandemic. The first repayment instalment, along with interest accruing, is now not payable until 30 November 2023. The loan continues to incur interest at 1.5% points above base rate and is due for repayment by 31 May 2036. The loan is secured by a first legal mortgage over the freehold property of the College.

During the year, a £3m loan facility was made available to Stonyhurst School, of which only £2m was drawn before the year end. The loan is to be repaid by 31 December 2024 at the latest and incurs interest at 2.5% points above base rate. The loan is secured against a number of schools' properties.

15 Short-term deposits

	Total 2021 £'000	Total 2020 £'000
Short-term deposits	29,876	37,595

16 Creditors: amounts falling due within one year

	Total 2021 £'000	Total 2020 £'000
Bank overdrafts and loans (see note 17)	220	195
School fees and other educational charges	1,011	805
Taxation and social security	235	232
Held on behalf of other Jesuit Provinces and projects	13,441	8,133
Grants committed	5,180	16,526
Expense creditors, accruals and other	2,070	2,600
	22,157	28,491

Following a review of the documentation surrounding the amounts held on behalf of the South Africa Region in the equity fund, the trustees have concluded that there is a constructive obligation to return the accumulated net unrealised gains relating to the Region, in the event it is requested. The creditor has therefore been increased to include any gains arising since the fund was initially established. No prior year adjustment has been posted on the grounds that the balances involved are not material to the Charity's balance sheet.

17 Creditors: amounts falling due after more than one year

	Total 2021 £'000	Total 2020 £'000
Bank loans (see below)		
Due within two to five years	553	756
Due after more than five years	18	424
	571	1,180
School fees and other educational charges	353	410
	924	1,590

Donhead School has two HSBC bank loans. The first loan was taken out in 2011 for £800,000 at an interest rate of 2% points above base rate. By the end of the year, £261,024 (2020: £315,857) was outstanding. The loan will be fully repaid by November 2025. The second loan was also in respect of building works. By the end of the year, £530,150 (2019: £1,001,515) was outstanding. The loan incurs interest at 2.1% points above base rate and is due for repayment by 2029.

The loans are secured by a first legal mortgage over the freehold property and by a guarantee of £240,000 given by the Trustees for Roman Catholic Purposes Registered to HSBC Bank.

18 Restricted funds

	At 1 Oct 2020 £'000	Income £'000	Expenditure £'000	Gains/ (losses) £'000	Transfers between funds £'000	At 30 Sept 2021 £'000
Beaumont Educational Trust	261	7	(9)	32	-	291
Guyana	16,841	391	(272)	2,466	(19,426)	-
Harare	16,754	334	(217)	2,135	-	19,006
Mission funds	3,966	1,780	(2,105)	-	160	3,801
South Africa	15,601	359	(144)	2,282	(18,098)	-
von Hugel	5	-	-	-	-	5
Young Priests (Osterley)	53,480	1,218	(2,093)	7,793	-	60,398
Zimbabwe	46,030	1,022	(1,084)	6,568	(52,536)	-
Other restricted funds	15	21	(3)	-	-	33
	152,953	5,132	(5,927)	21,276	(89,900)	83,534

Following a review of the status of the funds for Guyana, South Africa and Zimbabwe, the trustees have concluded that these funds, which have been built up internally, are more correctly classified as designated funds.

18 Restricted funds (continued)

Restricted funds are subject to specific conditions imposed by the donors.

- The Beaumont Educational Trust exists to provide financial assistance for the education of boys and young men, especially those who have a connection with the former Beaumont College, a Jesuit establishment. It is a separate charity, registered no. 309142, the trustees of which are Trustees for Roman Catholic Purposes Registered.
- The Harare Fund exists to support the Works of the Roman Catholic archdiocese of Harare in the Zimbabwe region of the Society of Jesus. This is for the purposes of education, the relief of poverty and the promotion of religion.
- Mission funds promote missionary Works in overseas countries by making grants to Christian missions, especially those of the Society of Jesus.
- The von Hugel Fund exists for the advancement of the Roman Catholic religion in the area of the Roman Catholic parishes of Boscombe and Iford near Bournemouth. These funds were part of a separate charity, registered no. 278966, but are now subject to a Uniting Direction and the Charity is therefore accounted for as part of the Society of Jesus.
- The Young Priests' (Osterley) Fund exists to encourage and support candidates for the priesthood.
- Other restricted funds represent one-off donations given for a number of specific purposes.

19 Designated funds

Included within the unrestricted funds are designated funds totalling £669,870,000. These are amounts which have been set aside for specific purposes by the trustees and are as follows:

	At 1 Oct 2020 £'000	New Designations £'000	Utilised £'000	At 30 Sept 2021 £'000
Foundations	44,734	8,596	(1,428)	51,902
Apostolic Works	98,842	11,443	(1,840)	108,445
Formation	158,820	23,482	(2,270)	180,032
Old Age	89,805	14,249	(2,409)	101,645
Bellarmino	75,939	12,625	(1,717)	86,847
Guyana	-	19,474	-	19,474
South Africa	-	18,098	-	18,098
Zimbabwe (Southern Africa Province)	-	52,536	-	52,536
Personnel support and training	11,231	1,631	(113)	12,749
Jesuit Development	943	119	(9)	1,053
Jesuit Communities	16,222	65	(298)	15,989
Local Trusts	2,340	2	-	2,342
Other educational funds	15,821	12,149	(11,491)	16,479
Society of Jesus Charitable Trust (1990 Trust)	112	588	(591)	109
Other designated funds	2,170	-	-	2,170
	516,979	175,057	(22,166)	669,870

19 Designated Funds (continued)

- The Foundations fund is for the establishment of new Works and the support of Works that cannot fully fund themselves. This support may be for capital building projects or for supplementing the income of already operational projects.
- The Apostolic Works Fund is used to promote and support various Works of the Jesuits in Britain.
- The Formation Fund exists for the education and training of members of the Jesuits in Britain and the Worldwide Society.
- The Old Age Fund is for the care of the elderly and sick members of the Jesuits in Britain.
- The Bellarmine Fund has been used in recent years primarily for the support of Heythrop College, although it was not designated solely for that purpose, being for other similar theological educational activities. It is being used to support the Heythrop Library and other follow-on legacy work.
- The Guyana, South Africa and Zimbabwe Funds exist to support the Works of these Regions of the Society of Jesus. These are for the purposes of education, the relief of poverty and the promotion of religion. Following a review by trustees and agreement with the auditors, these funds have been transferred from restricted funds into designated funds.
- The Personnel Support and Training Fund exists to develop and train lay people who have shown commitment to the work of the Trust, especially in Ignatian formation.
- The Jesuit Development Fund receives a small number of covenanted donations for various projects of the Jesuits in Britain.
- The Jesuit Communities Fund represents the net book value of freehold land and building used by our various communities.
- The Local Trusts Fund has been established to provide for the intended endowment of two independent schools.
- Other educational funds are used for school and other educational activities.
- The Society of Jesus Charitable Trust Fund exists to further the promotion of charitable work for the time being carried out by the Society of Jesus. This usually consists of making grants for the promotion of religion and educational purposes.
- Other designated funds represent amounts set aside to protect the income of Jesuit Works against undue volatility in the investment markets and ensuring their continued operations in such times.

20 Analysis of net assets between funds

	Unrestricted Funds		Restricted Funds £'000	Total 2021 £'000
	General Funds £'000	Designated Funds £'000		
Fund balances at 30 September are represented by:				
Tangible fixed assets	-	76,224	3	76,227
Investments	-	570,811	87,510	658,321
Net current assets	5,220	23,759	(3,979)	25,000
Creditors: amounts falling due after more than one year	-	(924)	-	(924)
Total net assets	5,220	669,870	83,534	758,624

Prior year analysis of net assets between funds

	Unrestricted Funds		Restricted Funds £'000	Total 2020 £'000
	General Funds £'000	Designated Funds £'000		
Fund balances at 30 September are represented by:				
Tangible fixed assets	-	73,465	6	73,471
Investments	-	400,873	168,411	569,284
Net current assets	6,504	44,231	(15,464)	35,271
Creditors: amounts falling due after more than one year	-	(1,590)	-	(1,590)
Total net assets	6,504	516,979	152,953	676,436

21 Pension commitments*Defined benefit scheme*

Retirement benefits for teaching staff of the Trust are provided by the Teachers' Pension Scheme ('the TPS') which is funded by contributions from the Society's schools and their employees.

Contributions to the defined benefit schemes are charged in the Statement of Financial Activities so as to spread the cost of the pensions over the employees' working lives with the schools. This amounted to £411,364 (2020 - £591,240) payable to the TPS.

The TPS is an unfunded multi-employer defined benefits pension scheme governed by The Teachers' Pensions Regulations 2010 (as amended) and The Teachers' Pension Scheme Regulations 2014 (as amended). Members contribute on a 'pay as you go' basis with contributions from members and the employer being credited to the Exchequer. Retirement and other pension benefits are paid by public funds provided by Parliament.

The employer contribution rate is set by the Secretary of State following scheme valuations undertaken by the Government Actuary's Department. The most recent actuarial valuation of the TPS was prepared as at 31 March 2016 and the Valuation Report, which was published in March 2019, confirmed that the employer contribution rate for the TPS would increase from 16.4% to 23.6% from 1 September 2019. Employers are also required to pay a scheme administration levy of 0.08% giving a total employer contribution rate of 23.68%.

The 31 March 2016 Valuation Report was prepared in accordance with the benefits set out in the scheme regulations and under the approach specified in the Directions, as they applied at 5 March 2019. However, the assumptions were considered and set by the Department for Education prior to the ruling in the 'McCloud/Sargeant case'. This case has required the courts to consider cases regarding the implementation of the 2015 reforms to Public Service Pensions including the Teachers' Pensions.

21 Pension commitments (continued)

On 27 June 2019 the Supreme Court denied the government permission to appeal the Court of Appeal's judgment that transitional provisions introduced to the reformed pension schemes in 2015 gave rise to unlawful age discrimination. The government is respecting the Court's decision and has said it will engage fully with the Employment Tribunal as well as employer and member representatives to agree how the discriminations will be remedied. A consultation was launched by the government on 16 July 2020 and closed to responses on 11 October 2020.

The TPS is subject to a cost cap mechanism which was put in place to protect taxpayers against unforeseen changes in scheme costs. The Chief Secretary to the Treasury, having in 2018 announced that there would be a review of this cost cap mechanism, in January 2019 announced a pause to the cost cap mechanism following the Court of Appeal's ruling in the McCloud/Sargeant case and until there is certainty about the value of pensions to employees from April 2015 onwards. The pause was lifted in July 2020 and the government is preparing to complete the cost control element of the 2016 valuations, which was expected to have been completed in 2021. A consultation was launched with the Government and the findings were published in March 2022.

In view of the above rulings and decisions the assumptions used in the 31 March 2016 Actuarial Valuation may become inappropriate. In this scenario, a valuation prepared in accordance with revised benefits and suitably revised assumptions would yield different results than those contained in the Actuarial Valuation.

Until the consultation and the cost cap mechanism review are completed, it is not possible to conclude on any financial impact or future changes to the contribution rates of the TPS. Accordingly no provision for any additional past benefit pension costs is included in these financial statements.

Defined contribution scheme

The Society of Jesus Trust also makes contributions to defined contribution schemes for the benefit of its employees. These amounted to £486,489 (2020: £360,796).

22 Connected charities and related parties

The Trustees for Roman Catholic Purposes Registered is also the trustee for the Society of Jesus Charitable Trust (1990 Trust – registered charity no. 803659).

The 1990 Trust uses the same principal office and has objects similar to many of those of the 1921 and 1929 Trusts. It is funded from the 1921 and 1929 Trusts by loans, and the amount due from the 1990 Trust at 30 September is £28,431,693 (2020: £28,403,290).

During the year, a loan facility was made available to Stonyhurst College as detailed in note 14. One of the Trustees is a Governor of Stonyhurst College, and after declaring his interest, abstained from voting when the decision was made.

During the year, Trustees received salary and pensions totalling £20,708, all of which was donated to the Charity.

There are no other disclosable related party transactions occurring during 2021 (2020: none).

23 Financial commitments

	Total 2021 £'000	Total 2020 £'000
The total commitments in respect of operating leases for equipment are as follows:		
Due within one year	39	34
Due within two to five years	59	64
	98	98

24 Capital commitments

Capital commitments at the end of the year were £5,578,000 (2020: £140,000). This relates to the refurbishment at St Beuno's Spirituality Centre (£1,432,000), the new Noviciate building in Birmingham (£4,054,000) and St John's Beaumont School upgrade (£92,000).

25 Contingent assets

Contingent assets have arisen from the transfers of schools to separate charitable assets.

On 1 September 2009 Stonyhurst College and its trading subsidiary Stonyhurst College Development Limited were transferred to a separate charitable trust. Included in the transfer were buildings valued at £18,100,000, a £4,000,000 transfer of restricted funds and a £21,700,000 cash transfer. This cash transfer was made with a condition that £16,000,000 remains in the Balance Sheet of Stonyhurst New Trust and is a contingent asset repayable to The Society of Jesus if the activities of Stonyhurst College change.

£1,800,000 is also held by Mount St Mary's College (a school transferred to a separate trust in 2007) and is repayable to The Society of Jesus in certain circumstances, such as closure.

26 Ultimate control

The Declaration of Trust dated 20 March 1929 provides that new trustees shall be appointed by resolution of the existing trustees and therefore, in the opinion of the trustees, the trustees are the ultimate controlling party.

27 Prior year comparatives by fund

	Unrestricted Funds 2020 £'000	Restricted Funds 2020 £'000	Total 2020 £'000
Income from:			
Donations and legacies	3,562	2,213	5,775
Charitable activities:			
School fees and other educational income	8,978	-	8,978
Other trading activities:			
Trading income	114	-	114
Other activities for generating funds	3,604	8	3,612
Investments	6,628	3,620	10,248
Other	396	6	402
Total income	23,282	5,847	29,129
Expenditure on:			
Raising funds	2,717	39	2,756
Charitable activities:			
Parish ministry	553	-	553
Education	13,470	270	13,740
Formation	3,559	1,785	5,344
Social justice and the relief of poverty	1,301	-	1,301
Care of infirm and elderly members	3,257	-	3,257
Spirituality	2,855	-	2,855
Work worldwide	374	3,317	3,691
Total expenditure	28,086	5,411	33,497
Net (expenditure)/income before gains on investments	(4,804)	436	(4,368)
Net gains on investments	27,922	7,225	35,147
Net income	23,118	7,661	30,779
Transfers between funds	(329)	329	-
Net movement in funds	22,789	7,990	30,779
Reconciliation of funds:			
Total funds brought forward	500,694	144,963	645,657
Total funds carried forward	523,483	152,953	676,436

28 Prior year summary of movement in funds


Restricted funds	At 1 Oct 2019 £'000	Income £'000	Expenditure £'000	Gains/ (Losses) £'000	Transfers between funds £'000	At 30 Sept 2020 £'000
Beaumont Educational Trust	297	9	(8)	(37)	-	261
Guyana	16,158	386	(525)	774	48	16,841
Harare	15,798	405	(119)	670	-	16,754
Mission funds	3,123	1,976	(1,414)	-	281	3,966
South Africa	15,086	362	(563)	716	-	15,601
von Hugel	5	-	-	-	-	5
Young Priests (Osterley)	50,811	1,515	(1,886)	3,040	-	53,480
Zimbabwe	43,678	1,022	(732)	2,062	-	46,030
Other restricted funds	7	172	(164)	-	-	15
	144,963	5,847	(5,411)	7,225	329	152,953


Unrestricted funds	At 1 Oct 2019 £'000	Income £'000	Expenditure £'000	Gains/ (Losses) £'000	Transfers between funds £'000	At 30 Sept 2020 £'000
General funds	4,300	1,598	(4,377)	8,932	(3,949)	6,504
Designated funds	496,394	21,684	(23,709)	18,990	3,620	516,979
	500,694	23,282	(28,086)	27,922	(329)	523,483


Designated funds	At 1 Oct 2019 £'000	Income £'000	Expenditure £'000	Gains/ (Losses) £'000	Transfers between funds £'000	At 30 Sept 2020 £'000
Foundations	43,168	864	(1,131)	1,833	-	44,734
Apostolic Works	96,970	1,316	(2,608)	3,164	-	98,842
Formation	152,501	2,939	(3,184)	6,564	-	158,820
Old Age	85,974	2,640	(2,495)	3,734	(48)	89,805
Bellarmino	70,156	5,267	(3,039)	3,555	-	75,939
Personnel support and training	10,649	222	(83)	443	-	11,231
Jesuit Development	905	18	(12)	32	-	943
Jesuit Communities	16,427	56	(261)	-	-	16,222
Local Trusts	2,335	5	-	-	-	2,340
Other educational funds	14,452	11,982	(10,332)	-	(281)	15,821
Society of Jesus Charitable Trust (1990 Trust)	687	324	(564)	(335)	-	112
Allocated investment gains	2,170	(3,949)	-	-	3,949	2,170
	496,394	21,684	(23,709)	18,990	3,620	516,979



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