

**Mothers' UNION**

Christian care for families

Reg charity 250823

**Diocese of Exeter**



# Mothers' Union: Exeter Diocese

Registered Charity No 250823

Accounts for the year ended 31st December 2022

# Trustees' Annual Report for the Period 1st January 2022 to 31st December 2022

## Reference and Administration Details

Charity Name: Mothers' Union in the Diocese of Exeter

Registered Charity Number: 250823

Charity's Principal Address: Exeter Mothers' Union Office  
St Sidwell's  
Sidwell Street  
Exeter  
EX4 6NN

Names of the Charity Trustees who manage the Charity:

Mrs Heather Sayle	Diocesan President
Mrs Janet Jones	Vice President and AFIA Coordinator

## Structure, Governance and Management

### Description of the Charity's Trusts

Type of Governing document	The Mothers' Union: Exeter Diocese Constitution says this organisation is an Unincorporated Association Registered as Charity Number 250823. It is affiliated to Mothers' Union, a Charity incorporated by Royal Charter (Charity No: 240531) through its shared aim and objects, and by virtue of its acceptance as an Affiliate by the Central Charity and its adherence to the rules and regulations of the movement.
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Trustee selection methods	Elected from membership
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### Trustees

Diocesan President	Heather Sayle	2022
Diocesan Vice-President	Janet Jones	2019
Diocesan Treasurer	Vacant	Nov 2022 - date
	Nikki Sweatman	Jan 2022 – Nov 2022 (resigned)
	Sue Addy	2019
	Revd Ian Blyde	Feb 2022
	Ruth Collop	2019
	Moirra Devonport	2019
	Nicky Over	2022
	Diane Passey	2022
	Lesley Thurley	2019 – Feb 2022 (resigned)

MU Matters Editor	Anna Venables	Autumn 2021
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## Officers

MU Diocesan Chaplains	Revd Caroline Luff Revd Tracey Voysey	2017 - 2023 2022
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Office Administrator	Lorna Young	2022
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## **Objectives and Activities**

Summary of the objects of the charity set out by its governing document:

1. To uphold Christ's teaching on the nature of marriage and to promote its wider understanding
2. To encourage parents to bring up their children in the faith and life of the Church
3. To maintain a worldwide fellowship of Christians united in prayer, worship and service
4. To promote conditions in society favourable to stable family life and the protection of children
5. To help those whose family life has met with adversity

### **Summary of the main activities in relation to these Objectives:**

In planning the activities, the trustee board have had regard to the Charity Commission guidance on public benefit, including the specific guidance for charities involved in the advancement of religion.

The MU Office began to get back into operation with the Administrator working in the office. The rooms were rearranged to allow the front office previously the MU Bookshop to become a useable meeting room which is easily and more cheaply heated.

During the year the Trustee Board met 12 times plus the AGM. The Spring Council Meeting and AGM was held at St Boniface Centre, Crediton and then the Autumn meeting was held at St Sidwell's, Exeter, in person for those who felt able to attend. The Cluster Leaders from the eight Clusters unfortunately did not meet as a group until September due to a Covid infection earlier in the year. The meeting was held in the MU Offices and was considered successful and productive. The Cluster groups met together in their own geographical areas for special events some in person and some on Zoom. The elected Trustees currently numbers nine members and two MU Chaplains with plans to appoint another Trustee in May at the AGM.

A special Evensong Service was held in the Cathedral led by the Lord Bishop of Exeter, Rt Revd Robert Atwell on 18<sup>th</sup> June for the Commissioning of the Diocesan President, Vice President and Trustees followed by a drink's reception in the Chapter House. Another Commissioning Service was held for our newly appointed MU Chaplain Revd Tracey Voysey and another Trustee in the Chapel at the Bishop's Palace on 30th November 2022. This was followed by coffee and mince pies in the Drawing Room at the Palace.

## **Achievements and performance**

Our Diocesan Branches have continued to adapt and change following covid and it has been good to welcome new members to our organisation. Some Branches have sadly closed but some have chosen to become Diocesan Groups and meet less formally without the need for Officers. Special events have been organised which have brought people together in Clusters and from across the Diocese which many have enjoyed and appreciated. Many of our members are vulnerable due to age and underlying health matters so the Trustees are most grateful to all those who have continued to support these members by visiting and calling them on the phone to keep in touch.

## **Summary of the main achievements of the Charity during the year:**

### **Governance**

There is a responsibility for ensuring that the Mothers' Union in the Diocese of Exeter complies with Charity Commissioners requirements and that correct accounting procedures are followed. The Trustees continue to encourage undertaking a Risk Assessment on MU Projects within the diocese and set Diocesan Subscriptions.

During 2022 we:

- developed an annual review of the MU Office equipment and diarise renewals
- continued work on the Branch Pack
- re-established the MU Office as a base for the Administrator post covid

Ongoing work for the next triennial includes:

- produce an updated Health and Safety Policy
- review office practices

### **Database**

During the year the following was achieved:

- the Database was updated and ably maintained locally and information shared with the Central Charity from the Exeter MU Database Officer
- installed new software including antivirus and a cloud back-up system

Ongoing work for the next triennial includes:

- ensure that all additions and amendments to membership details are correct
- continue to liaise with the new staff members at the Central Charity in charge of the Database

### **Safeguarding**

During the year the following was achieved:

- our Safeguarding Officer reported regularly to the Trustee meetings
- maintained good communication between the Central Charity's Safeguarding Team, the CofE Diocesan Safeguarding Team Lead and the Exeter MU Safeguarding Officer
- establish regular meetings of new Safeguarding Team and report to each Trustee meeting
- produced a new Safeguarding Policy

Ongoing work for the next triennial includes:

- continue to review the Risk Assessment Procedure
- await new instructions from the Central Charity following the Central Charity Safeguarding Review

### **AFIA**

During the year the following was achieved:

- we continued to work in partnership with schools, GP's, Homestart, Social Workers and Clergy for Away From It all (AFIA) referrals
- a new AFIA group was formed to help our AFIA rep with members from across the diocese.
- steps have been made to develop a new project for days out for families (Plymouth)

Hopes for 2023-24

- encourage local members to raise funds for our local Away From it All Holiday (AFIA) Projects
- develop a new project for days out for families in North Devon

## **Faith**

During the year the following were achieved:

- monthly Cathedral Prayer services were held in the Lady Chapel led by the Trustees and Clusters.
- Opening Prayers and a Eucharist for Diocesan Council and Trustee Board meetings
- we continued to provide an Emergency Prayer Chain
- Our Faith co-ordinator ably organised our Annual MU Retreat at Millhouse, Devon
- MU Members held Quiet Days around the Diocese
- we were generously and very ably supported by our two Diocesan Chaplains
- one of our Chaplains continued with her daily email message produced during covid to members who opted in to subscribe

Hopes for 2023-24

- build on our new connections with the Cathedral Co-ordinator and continue the monthly Cathedral Prayers led by our Clusters amidst their current building works
- encourage and improve our links with Clergy and Licensed Lay Ministers in the Diocese
- have a few MU Quiet Days and special MU services across the Diocese for members to attend

## **Outreach Initiatives**

During the year the following was achieved:

- provided warm knitted garments for preschool children from Ukraine
- visited Branches and Clusters to keep them informed of the work of MU and built on the success of social events for the Summer of Hope campaign and Make a Mothers Day
- improved links with Diocese through wider MU representation on Diocesan Synod, Deanery Synods and PCC membership
- supported the new Bishop of Plymouth on his pilgrimage from Exeter to Plymouth by meeting him at several of his stopovers and joining with him on his walks
- had two invitations to speak live on BBC local Radio about the 16 Days of Activism and our Red Chair campaign
- we were able to promote some of our projects through Roots and Shoots – the weekly diocesan online newsletter

Hopes for 2023-24

- encourage groups /branches to engage with the new MU Comms team when putting on MU events locally for Summer of Hope and Make a Mothers Day
- Maintain MU Live updating on Central Charity online platform

## **Social Policy**

There are two major strands of work in this area Raising Awareness of Modern Day Slavery and campaigning to eliminated Gender Based Violence in all its forms

During the year the following were achieved:

- Sent out 16 Days of Activism against Gender Violence resources to all Branches, Trustees, Clusters and Diocesan members. We held Silent Vigils around the Diocese inc 18+ Red Chairs put in parishes from 25<sup>th</sup> November – 10<sup>th</sup> December 2022
- kept members up to date with Social Policy matters, including Domestic Violence (DV), Gender Based Violence (GBV), The Clewer Initiative (Modern Slavery), Restored, the Prison Book Share, DP News, MU Matters emails and presentations at Diocesan/ Cluster/ Branch meetings

#### Hopes for 2023-24

- keep members informed of Social Policy issues from local diocese and Central Charity
- encourage membership of Communities of Interest associated with GBV and DV

#### Overseas

During the year the following was achieved:

- celebration of MU link with Melanesian Mission at Mary Sumner Day Service in Ottery St Mary
- successfully started a new project resourcing our MU members with sewing machines and other sewing equipment in the Solomon Islands

#### Hopes for 2023-24

- continue to promote the MU overseas, through talks and articles in Roots and Shoots etc
- continue to encourage members to support Make a Mother's Day
- find new contacts to practically (knitting etc) resource projects and encourage groups to take initiatives to support similar projects like the Sewing Workshop Project

#### Training

During the year the following was achieved:

- held a local training session for a MU speakers
- offered Clewer Initiative training through the Central Charity
- offered another Metamorphosis online course through the Central Charity and Metamorphosis Bitesize training
- Community of Interest groups from the Central Charity hosted training events online

#### Hopes for 2023-24

- continue to encourage new MU speakers
- offer a day at the MU office for new Branch leaders, Branch Secretaries and Branch Treasurers at least every Triennium
- offer Domestic Violence Awareness, Gender Based Violence Awareness and Modern Slavery awareness training

#### Metamorphosis

This was run again this year via Zoom online for 16 weeks meeting with members meeting online from across the Canterbury Province every fortnight.

During the year the following was achieved:

- some members took part in the MU Metamorphosis programme and have used Bitesize resources to work with PCC and other groups in parishes, deaneries and Mission Communities

#### Hopes for 2023-24

- encourage the use of Bitesize to explore new opportunities for MU in their local community

#### Communication

During the year the following was achieved:

- maintained links with MU@Home members by sending cards by post twice a year
- produced two issues of 'MU Matters'
- maintained our Instagram feed for Exeter MU and improved our promotional resources for Diocesan MU events and services
- established email groups for sending out DP News and items from Mary Sumner House

#### Hopes for 2023-24

- update and build a new MU Diocesan website with new Communication group
- improve our social media and online presence to be more up to date

#### **Finance and Office**

During the year the following was achieved:

- agreed to increase the individual MU subscription to £32 a year for 2023
- Our MUe Rep ensured whenever possible that Mothers' Union literature was on sale at events
- promote the new improved system to buy goods/cards online from the Central Charity
- improved audio and visual equipment for hybrid meetings (Zoom and in-person meetings) with new microphone, new webcam and (new to us) computer monitor
- updated the printer in the office
- encouraged more Diocesan Members to pay subscriptions by BACS
- arranged for new computer to be installed in the office in early Jan 2023

#### Hopes for 2023-24

- update the phone and broadband system
- review MUe following covid
- review possible grant funding applications



## Financial Review

Total receipts on the unrestricted general fund were £27,186 and are detailed in the financial statements. £12,839 of this amount was collected on behalf of the Central Charity. Total expenditure for the year on unrestricted funds was £38,494. so there is a deficit for the year of £11,308 leaving a general reserve at the year end of £24,615.

Most of the restricted fund balances are spent and movements on all funds are detailed in the notes to the accounts. There is a large balance for Big Book Share and this has been notified to the lead on this initiative so that it can be utilized.

It is our policy to maintain £20,000 investment with the COIF Charities Deposit Fund. This is there as a reserve fund and any interest gained is currently re-invested.

Policy on reserves:

It is good practice for the Diocesan Trustee Board to maintain a balance on unrestricted funds [if possible], which equates to at least 6 months' unrestricted payments, to cover emergency situations that may arise from time to time. At the year end, balances were in excess of this target.

## Declaration

The Trustees declare that they have approved the Trustees' Report above and the financial statements which follow.

Signed on behalf of the Charity's Trustees

Mrs Heather Sayle Diocesan President

Signature: *H J Sayle*

Date 10th May 2023

:

## Receipts and Payments Account

	Unrestricted funds	Restricted funds	Total funds	Prior year total funds
<b>Receipts</b>				
Donations and legacies	2,522	10,443	12,965	13,684
Income from charitable activities	20,593	20	20,613	18,066
Other trading activities	3,663	—	3,663	4,512
Investments	211	—	211	3
Other income	196	—	196	117
<b>Total receipts</b>	<b>27,186</b>	<b>10,463</b>	<b>37,649</b>	<b>36,384</b>
<b>Payments</b>				
Raising funds	6,026	—	6,026	1,670
Expenditure on charitable activities	32,467	8,567	41,034	62,682
<b>Total payments</b>	<b>38,494</b>	<b>8,567</b>	<b>47,061</b>	<b>64,353</b>
<b>Excess of receipts over payments before transfer</b>	<b>(11,308)</b>	<b>1,896</b>	<b>(9,411)</b>	<b>(27,968)</b>
<b>Transfers</b>				
Gross transfers between funds - in	—	—	—	25,490
Gross transfers between funds - out	—	—	—	(25,490)
<b>Excess of receipts over payments before other gains / losses</b>	<b>(11,308)</b>	<b>1,896</b>	<b>(9,411)</b>	<b>(27,968)</b>
<b>Net movement in funds</b>	<b>(11,308)</b>	<b>1,896</b>	<b>(9,411)</b>	<b>(27,968)</b>
<b>All assets at 01 January 2022</b>	<b>35,923</b>	<b>630</b>	<b>36,553</b>	<b>64,522</b>
<b>All assets at 31 December 2022</b>	<b>24,615</b>	<b>2,526</b>	<b>27,141</b>	<b>36,553</b>
<b>Represented by</b>				
<b>Unrestricted</b>				
General fund	24,615	—	24,615	35,923
<b>Restricted</b>				
AFIA DIOCESE	—	631	631	—
BIG BOOK SHARE DIOCESE	—	1,555	1,555	630
MULFEP MSH Fund	—	75	75	—
Overseas MSH Fund	—	265	265	—

## Statement of assets and liabilities

	General	Restricted	This year	Last year
<b>Current assets - Cash at bank and in hand</b>				
HSBC Current Account -	1,609	1,157	2,767	14,888
CCLA -	21,855	—	21,855	21,644
Petty Cash -	(61)	101	39	20
Cooperative Current Account -	1,211	1,267	2,478	—
<b>Totals</b>	<b>24,615</b>	<b>2,526</b>	<b>27,141</b>	<b>36,553</b>
<b>Grand total</b>	<b>24,615</b>	<b>2,526</b>	<b>27,141</b>	<b>36,553</b>

## Fund movement by type

Closing		Opening	Incoming	Outgoing	Transfers	Gains/losses	Journals
<b>AFIA DIOCESE</b>							
Restricted		—	6,574	5,943	—	—	631
	<b>Sub-total for AFIA</b>	<b>—</b>	<b>6,574</b>	<b>5,943</b>	<b>—</b>	<b>—</b>	<b>631</b>
<b>BIG BOOK SHARE DIOCE</b>							
Restricted		630	1,215	290	—	—	1,555
	<b>Sub-total for BIGBOOK</b>	<b>630</b>	<b>1,215</b>	<b>290</b>	<b>—</b>	<b>—</b>	<b>1,555</b>
<b>COMMUNITY DEVELOPMENT</b>							
Restricted		—	194	194	—	—	—
	<b>Sub-total for CDC</b>	<b>—</b>	<b>194</b>	<b>194</b>	<b>—</b>	<b>—</b>	<b>—</b>
<b>EMERGENCY RELIEF MSH</b>							
Restricted		—	639	639	—	—	—
	<b>Sub-total for ER</b>	<b>—</b>	<b>639</b>	<b>639</b>	<b>—</b>	<b>—</b>	<b>—</b>
<b>Make a Mothers Day M</b>							
Restricted		—	20	20	—	—	—
	<b>Sub-total for MAMD</b>	<b>—</b>	<b>20</b>	<b>20</b>	<b>—</b>	<b>—</b>	<b>—</b>
<b>MULFEP MSH Fund</b>							
Restricted		—	644	569	—	—	75
	<b>Sub-total for MULFEP</b>	<b>—</b>	<b>644</b>	<b>569</b>	<b>—</b>	<b>—</b>	<b>75</b>
<b>Overseas MSH Fund</b>							
Restricted		—	1,176	911	—	—	265
	<b>Sub-total for OVERSEAS</b>	<b>—</b>	<b>1,176</b>	<b>911</b>	<b>—</b>	<b>—</b>	<b>265</b>
<b>General fund</b>							
Unrestricted		35,923	27,186	38,494	—	—	24,615
	<b>Sub-total for General</b>	<b>35,923</b>	<b>27,186</b>	<b>38,494</b>	<b>—</b>	<b>—</b>	<b>24,615</b>
	<b>Grand total</b>	<b>36,553</b>	<b>37,649</b>	<b>47,061</b>	<b>—</b>	<b>—</b>	<b>27,141</b>

## Analysis of receipts and payments

			Total	
	Unrestricted	Restricted	This year	Last year
<b>INCOME</b>				
<b>Donations and legacies</b>				
Overseas Fund	—	1,176	1,176	853
MULFEP	—	644	644	625
Community Development Co-ordinators	—	194	194	531
Emergency Relief	—	639	639	387
Summer of Hope	—	—	—	769
Diocesan Fund	2,239	—	2,239	1,679
Gift Aid Claim	—	—	—	1,715
AFIA	—	6,574	6,574	6,152
Big Book Share	—	1,215	1,215	570
Miscellaneous Donations/Income	282	—	282	37
MSH Christmas Appeal	—	—	—	364
Total	2,522	10,443	12,965	13,684
<b>Income from charitable activities</b>				
Diocesan Members MSH Subscriptions	2,816	—	2,816	1,640
Branch Members MSH Subscriptions	9,400	—	9,400	10,454
Branch Diocesan Subscriptions	4,690	—	4,690	3,650
Diocesan Members Subscriptions	1,498	—	1,498	622
Annual Retreat	2,030	—	2,030	1,630
Diocesan Member Admin	—	—	—	69
Make a Mothers Day MSH	—	20	20	—
Speakers Charge	159	—	159	—
Total	20,593	20	20,613	18,066
<b>Other trading activities</b>				
MUe Shop Income	3,639	—	3,639	4,496
Income from recycling (ink + stamps)	23	—	23	15
Total	3,663	—	3,663	4,512
<b>Investments</b>				
CCLA Annual Interest	211	—	211	3
Total	211	—	211	3
<b>Other income</b>				
Closed Branch Funds	196	—	196	117
Total	196	—	196	117
<b>INCOME TOTAL</b>	<b>27,186</b>	<b>10,463</b>	<b>37,649</b>	<b>36,384</b>

## EXPENDITURE

### Raising funds

MUe Stock	5,904	—	5,904	1,612
MUe Postage	122	—	122	57
Total	6,026	—	6,026	1,670

### Expenditure on charitable activities

DM Subscriptions to MSH	3,000	—	3,000	2,343
Branch Subscriptions to MSH	9,839	—	9,839	10,329
Overseas Fund	371	911	1,282	949
MULFEP	316	569	885	505
Community Development Co-ordinators	110	194	304	687
Emergency Relief	110	639	749	533
UK Needs	—	—	—	124
Diocesan President Expenses	187	—	187	222
Trustee Expenses	494	—	494	313
Staff Costs	6,074	—	6,074	9,467
Telephone/Internet	1,030	—	1,030	622
Gas	267	—	267	410
Electricity	616	—	616	360
Rent	2,142	—	2,142	864
Event Room Hire	207	—	207	172
Business Rates	(411)	—	(411)	1,034
Insurance	484	—	484	463
Maintenance	711	—	711	—
Office Equipment	1,152	—	1,152	—
Stationery	18	—	18	11
Postage (Office)	33	—	33	94
Printing Costs	705	—	705	238
Conference Expenses	635	—	635	—
MU@Home Admin Costs	62	—	62	55
Diocesan Members Admin Costs	68	—	68	18
Retreat	2,120	—	2,120	1,670
AFIA	737	5,943	6,681	19,342
Outreach Projects	—	—	—	9,901
Big Book Share & Toy Box Scheme	—	290	290	—
Sundries	15	—	15	250
Bank Charges	170	—	170	—
Miscellaneous	103	—	103	323
SPEAKERS EXPENSES	152	—	152	—
MSH Appeal	769	—	769	605
Summer of Hope from Branches	—	—	—	769
Make a Mothers Day (MAMD)	—	20	20	—
Chaplain's expenses	171	—	171	—
Total	32,467	8,567	41,034	62,682
<b>EXPENDITURE TOTAL</b>	<b>38,494</b>	<b>8,567</b>	<b>47,061</b>	<b>64,353</b>
<b>GRAND TOTAL</b>	<b>(11,308)</b>	<b>1,896</b>	<b>(9,411)</b>	<b>(27,968)</b>

The financial statement of the diocese have been prepared using the Receipts and Payments basis.

Approved by the Trustees and signed on their behalf by:

Mrs Heather Sayle  
Diocesan President

Mrs Lorna Young  
Diocesan Administrator

*H J Sayle*

*L F Young*

Date: 10<sup>th</sup> May 2023

Date: 10<sup>th</sup> May 2023

# Independent Examiner's Report to the Trustees of

## **Mothers' Union in the Diocese of Exeter**

I report on the accounts of the charity ("the Trust") for the year ended 31 December 2022 which are set out on pages 10 to 13.

### **Responsibilities and basis of report**

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

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

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

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

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

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



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Date: 10 May

2023

Nigel Price  
Chartered Accountant  
Highfield  
Green Lane  
Appledore  
Bideford  
EX39 1QZ