



**The English
Province of the
Union of the
Sisters of the
Presentation
of the Blessed
Virgin Mary
Charitable Trust**

Annual Report and Accounts

31 March 2025

Charity Registration Number
327357

Contents

Reports

Reference and administrative information	1
Trustees' report	2
Independent auditor's report	49

Accounts

Statement of financial activities	54
Balance sheet	55
Statement of cash flows	56
Principal accounting policies	57
Notes to the accounts	64

Reference and administrative information

Trustees	Sister Janette Brown (from 1 August 2025) Sister Anne Marie Buckley Sister Mary Deane Sister Bernadette Healy Sister Angela Murphy Sister Eleanor O’Gorman Sister Susan Richert (from 1 August 2025) Sister Eileen Keating (until 11 September 2024) The Trustees are incorporated under the Charities Act 2011.
Province Team Leader	Sister Eileen Keating (until 11 September 2024) Sister Mary Deane (from 12 September 2024)
Province Bursar	Sister Eleanor O’Gorman
Administrative address	Provincial Office Presentation Convent Chesterfield Road Matlock Derbyshire DE4 3FT
Charity registration number	327357
Auditor	Buzzacott Audit LLP 130 Wood Street London EC2V 6DL
Investment managers	Rathbone Investment Management Limited 8 Finsbury Circus London EC2M 7AZ
Principal bankers	The Royal Bank of Scotland plc St Ann Street Manchester M60 2SS

Reference and administrative information

Solicitors Stone King LLP
Upper Borough Court
Upper Borough Walls
Bath
BA1 1RG

The Trustees present the statutory report and the accounts of the English Province of the Union of the Sisters of the Presentation of the Blessed Virgin Mary Charitable Trust (the charity) for the year ended 31 March 2025.

The accounts have been prepared in accordance with the accounting policies set out on pages 57 to 63 of the attached accounts and comply with the charity's trust deed, the Charities Act 2011 and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable to the United Kingdom and Republic of Ireland (FRS 102).

Introduction

The Union of the Sisters of the Presentation of the Blessed Virgin Mary (the Congregation) is an International Roman Catholic Religious Congregation. The Union was officially established and formally recognised by the Vatican as an Apostolic Religious Congregation of Pontifical Right in 1976. The Congregation was formed from the union of several autonomous Congregations that trace their roots to the first foundation of Nano Nagle in Ireland in 1775. A Congregational Gathering (Chapter) is held every six years and delegates from around the world gather to reflect on their life and mission and to elect a Congregational Leader and Leadership Team. The last Congregational Gathering was held in March 2024. The Congregational Leadership Team (CLT) are based at the Generalate in Monasterevin, Ireland. The governing document for all members of the Congregation is the Constitutions and Directives also known as *Our Way of Life*. There are approximately 870 professed sisters in the Congregation worldwide, it is divided into a number of Unit Communities of which the English Province is one.



The Leadership Team of the English Province was appointed by the Congregational Leadership Team in September 2021 for a period of four years until 31 July 2025. Their role, responsibility and accountability are outlined in the constitutions and Directives of the Congregation also referred to as *Our Way of Life*. A Unit Assembly was held in May 2025, and a new Leadership Team was elected with effect from 1 August 2025.

Introduction (continued)

At 31 March 2025, the English Unit comprised 51 sisters with an average age of 83.

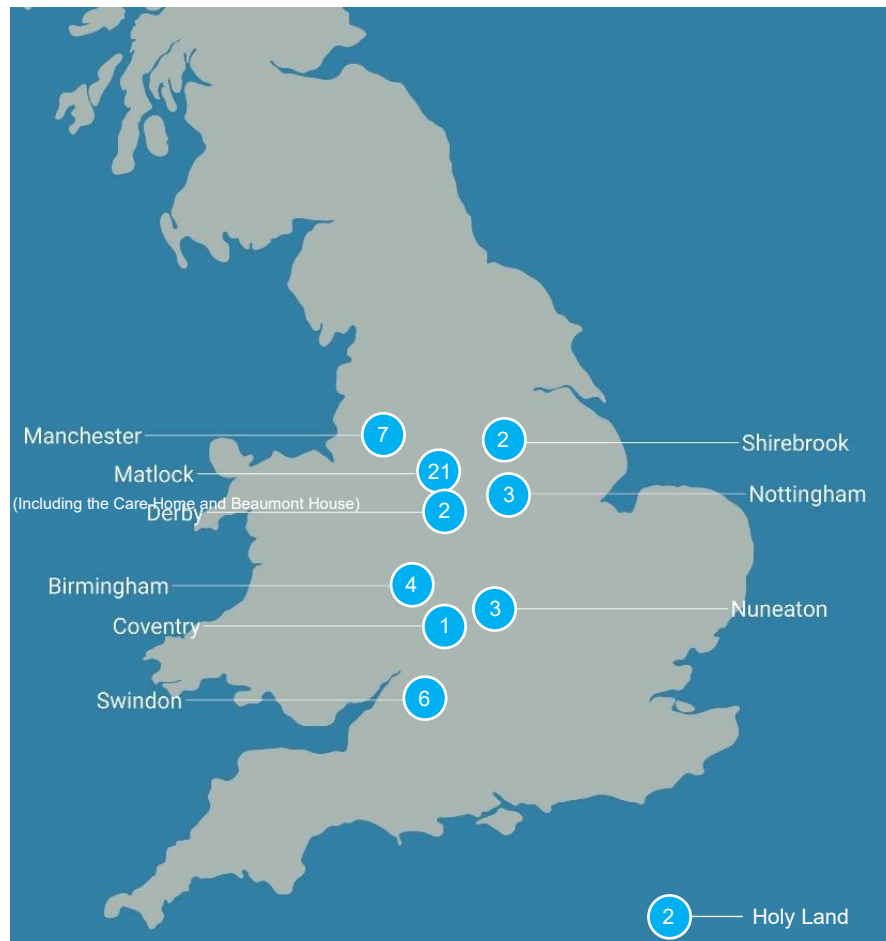
All of our sisters have given most of their working lives to the charitable activities of the Congregation both in England and abroad.

The accounts accompanying this report are the accounts of the charity on which the assets of the English Province of the Congregation in the United Kingdom are held and through which its finances operate. The charity is governed by a Trust Deed dated 14 February 1986 and Charity Commission Schemes dated 5 January 1987 and 24 February 1995. It is registered under the Charities Act 2011, Charity Registration No 327357.

Since first arriving in Manchester, England in 1836, the sisters have worked in various communities in England responding to requests to provide education, pastoral ministry and support to people on the margins. Many of our community houses were founded in order to minister in these areas and although mostly retired from formal ministry, the sisters continue to provide an important presence as well as support and help to the poor and marginalised.

In 2018, the English Province was asked by the Congregational Leadership Team to take responsibility for and develop the mission in the Holy Land.

Below is a map showing where the sisters are located. This includes sisters who are in the Care Centre in Matlock and Beaumont House in Derby.



Other Links

Members of the Province have links with many bodies within the Catholic Church and other organisations that share similar values to facilitate and continue the mission and also to provide support. Three significant affiliations are:

International Presentation Association - IPA

The Union of the Sisters of the Presentation of the Blessed Virgin Mary is affiliated to the International Presentation Association (IPA), which is a global network and advocacy mission of Presentation sisters and Presentation people. There are 12 Presentation Congregations affiliated, with around 1,400 Presentation Sisters located in 19 countries. This includes sisters from the Union, alongside many Presentation People, Friends of Nano and Associates. The mission of the IPA is to speak and act in partnership with others for global justice, from a contemplative stance, in a spirit of oneness with the whole of creation. Every five years representatives from the English Province Leadership Team and Justice contacts attend an International Presentation Assembly which is the main governing body. The last IPA Assembly was held in June 2023.

Conference of Religious of England and Wales - COR

The Conference of Religious seeks to be a dynamic and proactive presence of Church, particularly with those on the margins of society. It aims to unite its membership in collaborative initiatives translating gospel vision into reality, and to offer support to those in positions of leadership. Sister Mary Deane is a member of the Executive Board since May 2024. Throughout the year the COR has provided a number of collaborative workshops that our sisters have attended including: Eldercare; Charity governance, civil law, and Canon law; Financial and property management; and applying for visas.

Religious Life Safeguarding Service (RLSS)

The Province is a member of the RLSS and the sisters avail of the training and support it offers. The Provincial Leader attended the AGM along with the Safeguarding Lead.

Principal aims

The aims of the charity are to support the charitable work of the English Unit of the Union of the Sisters of the Presentation of the Blessed Virgin Mary. This includes education in its broadest sense and engagement in other charitable works based on the Christian message of "bringing good news to the poor" in accordance with the Roman Catholic faith and traditions as well as the Constitutions and Chapter Documents of the Congregation. We are committed to care for each other and for our earth.

Mission

The charity has a continuing commitment to support the work of the sisters of the Unit and the Congregation and to care for those members throughout their lives. The following are some of the ministries in which the sisters are engaged. All of these ministries benefit members of the general public.

Mission (continued)

They fall into the following main headings:

1 Residential and care establishment

A Care Centre owned by the sisters provides care and nurture for members of the public and sisters of the Congregation who are in need of such care.

2 Education, social, health and pastoral work

Sisters in the Unit are engaged in social and pastoral work in parishes, care homes, and to the travelling and gipsy community. The sisters are also involved in catechetical programmes in parishes, visiting the elderly, working with vulnerable women and children and with travellers and refugees.

Sisters also work in advisory roles in religious education, youth programmes and are also engaged in spiritual direction, counselling and therapeutic practice.

3 Overseas support

Members of the Unit support the work of our sisters abroad, especially in Zambia, Zimbabwe, Thailand, India and the Holy Land.

When setting the objectives and planning the work of the charity for the year, and when encouraging the work of individual sisters, the Trustees have given careful consideration to the Charity Commission's general guidance on public benefit.

Activities, specific objectives and relevant policies

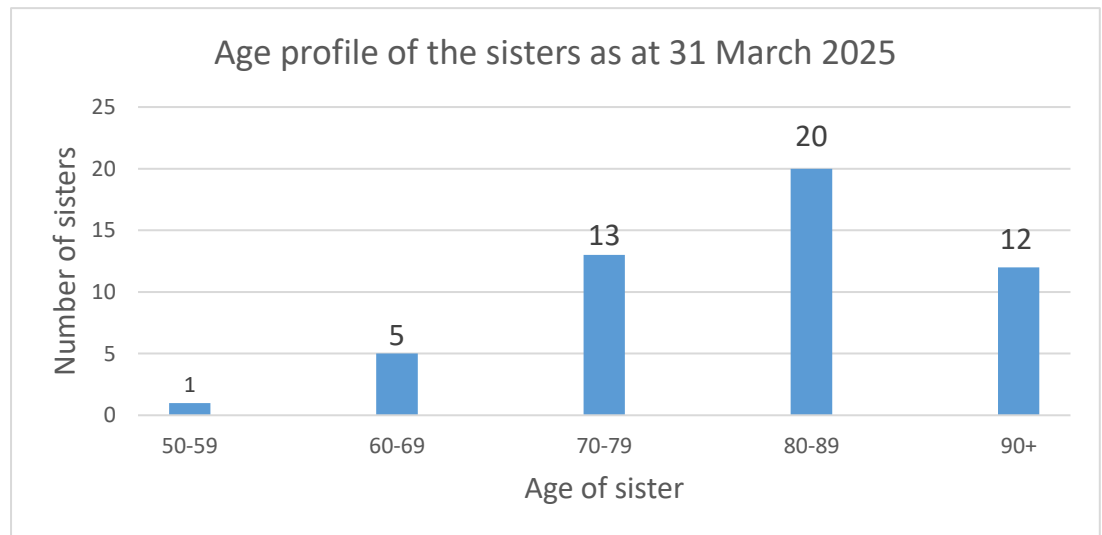
As stated above under "Mission", the activities of the charity can be divided into caring for members including older and frail sisters and three other principal areas:

- 1 Owning and operating of a residential and care establishment
- 2 Education, social, health, spiritual and pastoral work
- 3 Overseas aid and assistance

Activities, specific objectives and relevant policies (continued)

Care of members

As with other Congregations, the age profile of the members is increasing as existing members grow older and there have been no new vocations in the English Province in the last 30 years. The age profile is shown below.



The Congregation has an obligation, both moral and legal, to provide care for its members, none of whom have resources of their own and all of whom have devoted a significant part of their lives to the care of others who have been in need – both in this country and abroad. As the age profile of the Unit increases so too does the need to provide increasingly expensive care for the sisters.

We foresee that the number of sisters needing nursing/residential care will increase over the next decade.

The Trustees are giving careful consideration to the impact this will have on the Unit re:

- ◆ The work of individual members.
- ◆ The property requirements of the Unit.
- ◆ The financial implications for the Unit.

The aims of the Trustees in the forthcoming years include:

- ◆ To implement the decision made in January 2025 by the Trustees following consultation with the Sisters in the province and with the Congregational Leadership Team to become a Charitable Incorporated Organisation (CIO).
- ◆ Ensuring all members of the Unit receive the appropriate and good quality care they require to provide them with the quality of life they should rightly expect.
- ◆ Reviewing the charity's properties and their location in order to assess the needs of our sisters living in our community houses.

Activities, specific objectives and relevant policies (continued)

Safeguarding

As a province, we uphold the commitment to safeguarding as an integral part of the life and ministry of its members. We affirm the *One Church* approach to safeguarding children, young people and adults at risk as outlined in our Safeguarding Policy Statement.

Safeguarding Policy Statement

We, the Presentation Sisters in England, are committed to safeguarding and promoting good practice in ministry by all our sisters, staff, associates, and volunteers at all times. We consider the welfare of all children, young people, and adults at risk to be paramount. This commitment directly relates to the fact that we are all made in the image of God and the Church's common belief in the preciousness, dignity, and uniqueness of every human life. We start from the principle that each person has a right to expect the highest level of protection, love, encouragement, and respect. Following on from the safeguarding reviews in 2020, we are committed to the One Church Approach to safeguarding by implementing the changes needed and ensuring we respond to survivors promptly and compassionately. As part of our commitment, we will liaise with the Religious Life Safeguarding Service (RLSS) and statutory agencies to ensure that any allegations of abuse of those in our care are promptly and fairly dealt with. Additionally, through training and an ongoing engagement with safeguarding we will enable all our sisters, staff, and volunteers to make informed and confident decisions regarding any concerns raised.

Safeguarding Lead

Liz Jones was appointed as the new safeguarding lead in October 2024. Liz spent some time reviewing the responses to the Community and ministry audits. The safeguarding policy was reviewed and rewritten in November 2024 to better reflect the one church approach to safeguarding.

The trustees, sisters and staff have undertaken relevant and appropriate safeguarding training organised by the RLSS and other agencies.

Operation of a residential and care establishment

The Charity owns and operates a Nursing and Residential Care Centre for vulnerable elderly adults at its site in Matlock, under the trading name of: The Presentation Sisters Care Centre.

This is a dual registered 36 bed care centre – which is increasingly rare, registered with the Care Quality Commission (CQC).

Each of the rooms has a TV, wash basin facilities and all are linked to a recently upgraded nurse call system; Only one room is en-suite. All areas of the home are accessible by lift/stairs. Residents are encouraged to use the sitting rooms/dining areas throughout the Care Centre. During spring and summer, many of our activities are conducted in our outdoor space to encourage well-being.

This Care Centre has now been established for over 30 years.

Activities, specific objectives and relevant policies (continued)

Operation of a residential and care establishment (continued)

The philosophy of the Care Centre continues to be embedded in its mission statement: 'To strive to respect the individuality, dignity and need for privacy of each person and to encourage freedom of choice in daily living. Placing the person at the heart of their care, we work continually in partnership with them, their family, friends and associates as well as our healthcare professionals to achieve this.'

Whilst the Care Centre is owned and operated by the Presentation Sisters - with a catholic ethos, it operates very much as a diverse and inclusive environment where equality of care is given to all its residents.

The Care Centre continues to operate in a very challenging sector of health and social care where during this year alone, another residential home closed in the Matlock area. Such closures are never welcome, creating greater demand on an already under-funded and under-resourced sector. This is particularly true of the continuing challenge to attract and retain experienced and competent trained registered nurses and healthcare assistants who underpin achieving person centred care for our residents.

However, despite the challenges, the Care Centre has been resilient and continues to maintain an excellent reputation across Derbyshire. As our areas of expertise are in palliative and end of life care, we remain the provider of choice for these services.

Still underpinned by the philosophy of the mission statement, always aiming to retain our unique and sustainable position, the following vision is now the working culture of the centre:

- ◆ Developing the Presentation Sisters Care Centre as a teaching Care Centre of exemplar practice and care, so positioning ourselves against our peers as the first choice of care setting and employment.
- ◆ Developing and training our staff to deliver quality evidence-based care to our residents.
- ◆ Strengthening our links with local universities, professional healthcare bodies and networking with local and national leaders in the adult social care field of practice, so providing opportunities to progress and adapt to the wider socio-economic changes.
- ◆ Maintaining our uniqueness by continuing to align ourselves with the values, ethics and ethos of the Presentation Sisters under the vision of Nano Nagle.

By developing a more ambitious vision, our working objectives have become more ambitious and with it, we remain competitive and respected amongst our peer and allied healthcare professionals.

This year we have achieved the following objectives:

- ◆ Continued to proactively re-evaluate, re-define and refocus our efforts on a regular basis to check we are still achieving our vision of exemplars of best care and practice.
- ◆ Review our strategies and our risk against our external environment on a regular basis.

Activities, specific objectives and relevant policies (continued)

Operation of a residential and care establishment (continued)

- ◆ Equipping our staff with the skills and knowledge needed to fulfil their roles through a structured and evidence-based development programme.
- ◆ Identifying key personnel – who will strengthen and underpin the positive and dynamic working culture of The Presentation Sisters Care Centre.
- ◆ Embracing the vision of the Care Centre.
- ◆ Aligning to the values and ethics of the Presentation Sisters.
- ◆ Rewarding and developing our staff. They are our key asset and our strength.

Our key personnel who are working collaboratively across the Care Centre to achieve our objectives are:



Registered Manager
Jayne Carnall



Lead Nurse
Jo Green



Clinical Practice Facilitator
Chris Earl



Deputy RGN
Sarah Binns



Deputy RMN
Mel Tooth



Care Co-Ordinator
Carol Parr



Head of Maintenance
Paul Shepherd



Head of Catering
Sara Hall



Administration
Caroline Baldwin



Head of Activities
Claire Buttle

Activities, specific objectives and relevant policies (continued)

Operation of a residential and care establishment (continued)

With this team, we have collectively achieved these key objectives:

- ◆ Effective and proactive 'working committees' in areas of: Clinical Governance, Health and Safety, Stakeholder Engagement and Mentorship.
- ◆ Established a robust professional development practice, with our trained nurses developing their portfolios and specialisms.
- ◆ Redefined our recruitment and induction process with the development of the mentorship team to support best practices and behaviours
- ◆ Created stronger and more professional links with our professional bodies – in particular working alongside Derby University to receive and support student nurses.
- ◆ Developed and part of a local collaborative group of care homes to start to share best practice with each other and support one another through challenging times.

Each of our achieved objectives underpins the well-being of our residents and staff and this has been supported by the sisters in the congregation.

Throughout this year, the Care Centre has worked in partnership to assist members of the English Province in their charitable and religious work. Currently four members are cared for in the charity's care centre whilst other members were enabled to work and volunteer in their chosen ministry.

The Chaplaincy Team from the Matlock Community have been an invaluable support to residents and their families during difficult times. Often unexpected times, the sisters have taken time late into the evenings and at weekends talking and providing religious and spiritual support with the residents. This once again has been met with much appreciation and praise from them and their families and reflects the ethos of the centre.

The residents of the Care Centre have enjoyed a sense of community this year with more joint gatherings and real sense of community. Further to this, the 'Capacitar' team made up of sisters from other communities around England have brought comfort and joy to the residents. One sister takes turns to bring simple and ancient healing skills to our residents. The aim of the exercises is to be used at times when we feel depleted of energy, low in mood and the lift is given. The Care Centre is extremely grateful for the time taken by all sisters who extend their ministries to residents.

Activities, specific objectives and relevant policies (continued)

Operation of a residential and care establishment (continued)

The following photos are examples of the sisters of the English Province offering both ministry and enjoying time, socialising and celebrating as a community with the residents of the Care Centre:

Capacitar sessions run by the sisters for our residents and sisters. These sessions were held in the Care Centre.



The Care Centre enjoys a unique sense of community with the sisters.

Here are some examples of this:

Our summer party in the convent hall due to inclement weather! This was enjoyed by our residents, sisters, associates and family members. All staff involved from planning to the day preparation created a wonderful environment for everyone.

Activities, specific objectives and relevant policies (continued)

Operation of a residential and care establishment (continued)

Christmas Time



Always a busy time in the Care Centre and this year we celebrated and truly entertained our residents, sisters and school children from our link schools.

These are photos of everyone enjoying our Christmas Pantomime in the convent hall:



Activities, specific objectives and relevant policies (continued)

Operation of a residential and care establishment (continued)

We were also fortunate to have the opportunity to be invited to St Joseph's Primary School Nativity play and here are some photos of our residents and family members who were able to attend:



This year the activities team re-introduced a monthly coffee morning held in the convent hall. The objective of the morning's is to encourage greater connection of our residents with both sisters but also members of the wider community. This very much picked up pace during the year and as you will see from the photos, well attended and enjoyed by all:



One of the Care Centre's primary objectives, alongside first-class care, continues to be a person centred, blended programme of exercise, song, entertainment and companionship which engenders a life as meaningful and purposeful.

Our activities programme continues to be robust and proactive. We have strong links with both St Joseph's and All Saints Primary School as well as 6th Form Students giving up one afternoon a fortnight to visit our residents.

Here are a few examples of the work undertaken during the past 12 months:

Encouraging our own residents to develop and deliver a presentation of his life and work, is a theme we have developed over the past 12 months to good outcomes. This is an example of one resident who has now delivered two presentations to staff, residents, sisters and sixth form students.



Activities, specific objectives and relevant policies (continued)

Operation of a residential and care establishment (continued)

Exercise and stimulation remain key to the well-being of residents, and we have delivered a blended programme of activities to deliver this outcome. Here are some examples:



Chair based exercise – every Monday morning for residents and sisters to join in



Ball games



Board game days - Always popular and always well attended

The centre has once again been privileged to work alongside dedicated volunteers. In particular the same group of volunteers have delivered a weekly art session for our residents and sisters for now over four years. Here are a few photos to celebrate these wonderful groups:



Quiz mornings, an opportunity to reminisce and rediscover the art of conversation.



Activities, specific objectives and relevant policies (continued)

Operation of a residential and care establishment (continued)



The centre is still very much focused on developing and maintaining the close links we have created over the years with St Joseph's school on the convent site along with the wider school community.

The centre has weekly visits from primary school children, and this is always well received. Here are some photos capturing this:



Visits from our sixth form students.



Activities, specific objectives and relevant policies (continued)

Operation of a residential and care establishment (continued)

Entertainment

We entertain and love to be entertained. The centre is fortunate to avail of several outside entertainers who know our residents well and are always well received. Here are some examples:

The Songbirds are a group of volunteers who regularly frequent our Care Centre.



Here are our residents enjoying 'Razzle Dazzle' another regular feature in an afternoon:



Paper Kite and James, our other regular entertainers, continue to entertain and please our residents.



Care Centre Management Board

The Trustees, via the Care Centre Management Board they have established, aim to ensure the Care Centre meets the required standards and legal requirements and strives to improve.

The Management Board meets four times per year and supervises the operation of the Care Centre by: setting budgets, agreeing an annual business plan, receiving monthly reports from the Registered Manager, considering reports from the monthly providers' visits and general business supervision to give direction and compliance.

Activities, specific objectives and relevant policies (continued)

Care Centre Management Board (continued)

The Care Centre has an established Clinical Governance Committee, and all manner of clinical governance and compliance are shared between the team with regular audit and supervision at the centre of this. In addition to this the Care Centre has quarterly pharmacy inspections, and corrective action is always taken following any findings. The Care Centre also enjoys a pro-active and effective working relationship with its other healthcare professionals who collectively deliver focused care and support to its residents.

Again, this year we have received no significant complaints about the care and service we provide and responded quickly and proactively to any concerns raised. The Care Centre has again received many compliments, and this is important to reflect once again on the philosophy of the Care Centre as set out at the beginning of the report.

Here are some examples of compliments and comments we receive on a regular basis which continue to reflect the charism of the Care Centre:

I just want to say thank you, you all do an amazing job looking after my dad. I am so pleased that when we visit dad is always clean and presentable. I am very thankful for all you do. You all do such a fantastic job, and I am forever grateful to you all! Thank you from the bottom of my heart.

Thank you coming to see me in my room.

We are all angels! I love the care and time we spend together.

Thank you for letting me paint in the lounge daily, whilst my daughter is away, as you know I normally go out most day.

I know how difficult things can be, I appreciate all you do for my mum.

Thank you all for everything that you do for our mum, I love baking you all cakes.

Mum is so very happy here, we could not ask for more nothing is too much trouble, I never thought that mum would settle or join in on so many different activities.

I like talking to the other residents and the quizzes are fun.

I enjoy having my hair done, always makes me feel better.

Thank you for all that you have done for me and all the laughs we have had together.

Education, social, health, spiritual and pastoral work

The sisters continue to carry out various forms of educational, social and pastoral work. Some of this continues to happen through letter writing, Microsoft teams and zoom meetings, on the telephone as well as face to face.

Activities, specific objectives and relevant policies (continued)

Education, social, health, spiritual and pastoral work (continued)

Many sisters have ministered in India, Africa, and Europe and their experience brings a richness and global feel to the Province. However, the age and declining health, of the sisters, has had a significant impact, on the energy, vibrancy and involvement in ministry which is part of the life of the Province.

England of today is enriched by being a multi-cultural, multi-faith and multi-ethnic society. It has an ageing society, causing a crisis in social care and in the NHS. In addition, it is a country with over 4 million children living in poverty. It is more divided than ever between rich and poor, north and south, with issues regarding integration of migrants and refugees, and increasing levels of trafficking, homelessness and substance abuse.

There are increasing numbers of young people with mental health issues alongside becoming a country where the majority do not hold religious beliefs; where parishes are closing because of lack of priests, and where there are fewer vocations.

It is in this atmosphere that the sisters live and carry out their ministry and mission. They do this through prayer, education, pastoral work, health care, social work, catechetics, spirituality and faith development, chaplaincy, advocacy, counselling, work with travellers, refugees and asylum seekers. Through the giftedness of each sister, we try to meet the needs of individuals and society where possible, in the places where we find ourselves.

Our lifestyle tries to facilitate communion with the poor and availability to those in need. Living simply, we challenge materialism, exploitation and injustice and give witness to Christ and his values.

The Heart of Presentation

Hospitality and Community are at the heart of 'Presentation'. We share our stories, our ministries, our struggles and challenges with each other, with our Friends of Nano and Associates, as well as celebrating with gratitude our journey in life. 'Presentation' is dynamic, being with people as we reach out to make Nano's vision alive in our time and place, following our models Mary and Nano. We listen and respond to God in our lives and journey into the unknown as Mary and Nano did. We aspire to live lives of commitment, dedication, availability and being of service to all, especially to those made poor, so that they become empowered. We give witness by living lives of simplicity, by living the present with passion and by allowing God to love each of us more deeply as we strive to live as prophetic missionaries.

Sister Bernadette Healy wrote an article about her ministry for the Global Sisters Report (www.globalsistersreport.org) in April 2024 which highlights some of the above: ***Ministry to Irish Travellers, Gypsy and Roma groups strengthens my faith***

Activities, specific objectives and relevant policies (continued)

Education, social, health, spiritual and pastoral work (continued)

The Heart of Presentation (continued)

I am a sister of the Presentation of the Blessed Virgin Mary, working in Nottingham, England, primarily with the Irish Travellers, Gypsy and Roma community. I have a wonderful team of volunteers and co-workers from the diocese who assist me in pastoral work with families, preparing children and youth for baptism, first Communion and confirmation, and adults for marriage. It is a wonderful ministry and very varied, including conducting classes to helping those who cannot read to reply to letters, fill out forms, apply for passports and whatever else might come up.

According to the Traveller Movement organization in Britain, Irish Travellers are a nomadic group of people from Ireland who have a separate identity, heritage and culture from the community in general. Irish Travellers' presence can be traced to 12th-century Ireland, with migrations to Great Britain in the early 19th century. The movement estimates about 300,000 Gypsy Roma and Traveller people currently live in Britain.

The organization estimates that Romani gypsies have been in Britain at least since 1515, migrating through Europe from northern India. The name "gypsy" was given by settled folk who mistook them as Egyptians because of their dark complexion. It is also known that there were Indigenous nomads in Britain when the new arrivals came.

According to the organization's website, the people live a variety of different lifestyles, some "on the road" and some living in mobile homes or caravans on council or private sites. Others settle in one place during school periods and travel during summer; while others live in permanent housing but retain their culture and traditions.

Most of this community I work with grew up on a particular site, living in mobile homes or caravans. Living conditions are often cold and damp, and outdoor toilets are most common. Outdoor play areas for children are usually non-existent or unhealthy, at times infested with rats.

Living conditions are extremely crowded, so when a young couple marries, they cannot stay with their parents. They move into their own trailer, if lucky, or into a small flat, what we call a bedsit. At least they have a roof over their heads, but it separates them from the community, which is against their culture. Some live in emergency housing for the homeless, waiting for local authorities to help them find housing. Needless to say, it is very stressful for them. A submission in October 2018 to the Development of the Traveller Accommodation Programme 2019-2024 states that "Travellers are 11 times more likely to become homeless and 22 times more likely to be discriminated [against] by landlords."

Education is another challenge. Most children I encounter attend primary school to age 11 (75-85%), but at the point of transfer to secondary school, dropout rates are magnified, with only about 20% registering. There is still a cultural pattern of boys staying with their parents to learn a trade and girls staying home to learn skills for childcare and housekeeping, with a belief that it is time to focus on Traveller life and identity. Another reason for not advancing in school is fear of bullying, drugs or promiscuity at the "big school."

Activities, specific objectives and relevant policies (continued)

Education, social, health, spiritual and pastoral work (continued)

The Heart of Presentation (continued)

Living such an alternative life brings with it the suffering of intense discrimination. When I was on a visit to one family with little income, they shared, "We are treated badly everywhere we go. We are living in awful conditions, and no one wants to help us, really." Another shared, "It's not what people say; at times, they are very careful. It's a feeling you get, that look that only travellers would know. The conversation stops. The side looks at each other... It happens everywhere I go."

I have found The Traveller Movement very helpful in my ministry. This national charity is committed to the fulfilment of human rights for ethnic minority Gypsy, Roma and Traveller communities to achieve equality through self-determination and proactive participation in influencing and shaping policy.

It provides direct support and advocacy across a range of issues, including education, hate crimes and discrimination, and provides access to justice through early legal remedies. It also carries on research and policy advocacy and works in partnership with community and volunteer organizations to bring about social change.

The group assisted a family I know who were struggling with their electricity meter. Each week they put aside money for electricity, but the local council refused to give them receipts, so they had no idea how much electricity they were using. They also had no running water, and the site had not been upgraded since 1985. They described for me the conditions they lived in: "I can't afford to keep the place warm. The second the heater goes off, it is freezing. The children go to bed early with extra blankets. I sit up with a candle rather than turn on the lights because I don't know if I can afford to." The Traveller Movement stepped in and is working with the council to bring the site up to current living standards.

Mental health is definitely impacted by these harsh conditions. Suicide rates are six times higher than they are in the general population and life expectancy remains much lower. Since COVID, suicide among youth and even children as young as 11 has increased. These young deaths have a devastating effect on family life, which is overcome by grief. Often, I wonder how in the world these families survive and keep faith.

Gypsies and Travellers are more likely to be self-employed than the general population. The men do driveway paving, home improvement and other industrial-type businesses, including scrap and home trading. Some sell cars, do metal work, paint, or do roofing or plumbing. Management and maintenance of local caravan sites are often well-managed by members of the community. Women often make and sell keychains, bracelets and earrings; resell clothing; and read palms as a form of income to support the family.

My own faith in God has been strengthened and enriched by living and working among these people because of their amazing deep faith and commitment to prayer and companionship. I also feel a strong kinship with our foundress, Nano Nagle, whose commitment sent her out each day to be with those kept poor by unjust systems. I often feel she walks beside me each day as I journey among these people.

Activities, specific objectives and relevant policies (continued)

Education, social, health, spiritual and pastoral work (continued)

The Heart of Presentation (continued)



Sr Bernadette Healy, far left with a group of travellers at Westminster Cathedral, London.

Ministry of Prayer

The Eucharist is central to our lives as Presentation Sisters. The time we spend in silent prayer in community before the Blessed Sacrament is most helpful and the Presentation Day Novena unites us all powerfully. Growing in a deeper prayer life involves growing in the right relationships. Beginning the challenge of each day anew calls us to a deeper trust in a compassionate and loving God and to share his gifts with all we meet. Strengthened by His presence we can be filled with joy and open to the inspiration of the Holy Spirit. We need to be filled with Christ and to share the Word of God with others. Many of our sisters offer spiritual accompaniment and opportunities for prayer in their localities.

With our Friends of Nano and Associates we are growing in our understanding of interconnectedness with creation and all people, striving to create a more just and peaceful world as grow in our understanding of our call to a *Spirituality of being in Communion*. We celebrate our communion with the whole congregational community and our Friends of Nano/ Associates, on **Presentation Day** which is celebrated on **21 November**. The following are a snapshot of how we celebrate this day in some of our communities.

Shirebrook

Each year on the feast of the Presentation of the Blessed Virgin Mary, Presentation Sisters all over the world celebrate their feast-day. Nano Nagle, their foundress said that the symbolism that appealed to her in Mary's Presentation, was the ideal of Mary's complete gift of herself to God - a gift freely given and then lived out in service.

In Shirebrook Sister Mary and Sister Susan along with Key Stage 2 children from St. Joseph's Primary School celebrated the feast with Mass. Just before the offertory, one of the children invited the Sisters to renew their Vows before Canon John Kyne, the Parish Priest, the school community and Associates - who also renewed their promises.

Activities, specific objectives and relevant policies (continued)

Education, social, health, spiritual and pastoral work (continued)

Shirebrook (continued)

In the name of our Lord and Saviour Jesus Christ, under the protection of his Immaculate Mother Mary, I renew this day the Vows of Poverty, Chastity and Obedience which I made at my profession. I promise to persevere to the end of my life in this Congregation of the Presentation of the Blessed Virgin Mary. I humbly ask the prayers of this community that I may fulfil these obligations. Amen.

The presence of the children was an important reminder of Nano's love of children and her insistence that we prefer the schools to other ministries. She risked her life in setting up 7 schools in the city of Cork in the 1770s. The children placed a candle in front of all the countries where the Sisters minister today. It was a joy to celebrate with them.

Later, Sisters Mary and Susan went over to school to share a little of the story with Key Stage 1. Each child was given a candle, we sang and prayed - and much to the sisters delight - the children had been learning about Nano and could tell us some of her story. The high point of course, was a little treat given to every child and to the staff - it all helps to remember a special day.



*This article was written by Susan Richert for the website
(photos used with permission from the school)*

Matlock

Presentation Day 2024 followed its usual festive pattern for the community in Matlock. Chapel looking lovely with Sister Gabriel's copy of Titian's beautiful painting of the child Mary's Presentation placed at front of the Altar.

Father Bernard faced icy roads to make sure we could have Holy Mass on our special Day. Among many other sentiments in his homily, he referred to the word 'present' which can mean 'I'm here present' or 'I give a present' both notions very appropriate for us as Presentation People. Today especially, we were mindful of all our sisters worldwide and all our associates and co-workers everywhere. The privilege of 'Belonging' to the Presentation Family is never lost on us but on Presentation Day in particular the feeling is strong. We thank God for Our Lady who gave her very self, Nano who gave her all, those gone before who inspired us and those of us still here keeping the Lantern flame alive.

Activities, specific objectives and relevant policies (continued)

Education, social, health, spiritual and pastoral work (continued)

Matlock (continued)



Acocks Green

We the Associates along with Sister Angela and Sister Eleanor shared the Presentation Novena and reflected on standing at the margins where we encounter our brokenness and the brokenness of all around us. We were encouraged to go out and remind people the importance of HOPE. Then we spent some time in prayer for those in need and asked Mary of the Presentation to continue praying for us.



Working in Collaboration with others

Ministry of Justice

The ministry of Justice is a core commitment of the members of the Presentation Congregation, Friends of Nano, Associates and co-workers. To carry out this statement we see the following as our vision:

- ◆ To act justly in all our dealings with each other.
- ◆ To promote justice within our own community and province structures.
- ◆ With others we wish to challenge unjust structures, especially those that exploit and oppress women and children.
- ◆ We stand in solidarity with all the oppressed for liberation and self-empowerment.
- ◆ We will be alert to any violation of human rights and call on one another to take immediate action for justice.

Activities, specific objectives and relevant policies (continued)

Working in Collaboration with others (continued)

Ministry of Justice (continued)

The sisters, Friends of Nano, Associates and all with whom we network, are committed to change at personal, local, country and world level in order to bring about more just systems, fair trade issues, care of our earth and sustainable development.

We engage with the sustainable development goals and as we work to care for our common home. We are engaged with all issues that pertain to the elimination of violence against women and children, taking specific account of indigenous peoples, migrants, refugees and asylum seekers. We collaborate with the Two Irish Provinces and have established an Inter-Provincial Justice Desk and employ Brian O'Toole to co-ordinate this ministry and to link with the International Presentation Association (IPA).

We write letters, protest peacefully, challenge respectfully on behalf of those unable to do so themselves. We network with other groups both in localities and globally to bring about change. We look at our own use of resources and try to be responsible and careful. Re-cycling is encouraged and taken seriously as is the use of energy in our houses; so also, is the whole area of ecology and care of the earth.

Within the English Province the work of Justice is co-ordinated by the **Justice, Peace and Integrity of creation (JPIC) Commission**.

The members of the JPIC Commission are Sisters Jacinta McKillion, Carmel Clancy, Eleanor O'Gorman and Catherine Tompkin. They meet once a month on zoom for approximately an hour. At these meetings Jacinta, who is also our Coordinator for Interprovincial Collaboration (CIC), shares on any issues which may have arisen at her monthly meeting with Brian O'Toole, Director of the Justice Desk and the two CICs from the North East (NE) and South West (SW) Provinces in Ireland.

The purpose of our JPIC Commission is - to increase awareness about the root causes of local and global poverty and injustice and to find meaningful ways to act for change.

The JPIC Commission send out the JPIC News each month to Sisters and Associates, raising awareness about justice issues and IPA priority action areas. In this way all Presentation people are alerted towards prayer and action.

The Commission have drawn up a calendar to reflect events and actions for each month e.g. in February 2025, the focus was on praying for those who have been trafficked.

They also collaborate with the JPIC Commissions in the SW and NE Provinces. An example of this is that each year they work together on a prayer service for the Season of Creation. This took place on zoom on October 4, 2024. On February 19, 2025, all three Provinces were invited to listen to a talk on zoom given by Denis Tully, the CEO of Emmanuel House Charity Nottingham about homelessness which was most inspiring and informative.

Activities, specific objectives and relevant policies (continued)

Working in Collaboration with others (continued)

Ministry of Justice (continued)



JPIC Commission Zoom Meeting. From Top Left clockwise: Sr Carmel Clancy, Sr Eleanor O'Gorman, Catherine Tompkin, Sr Jacinta McKillion.

Embracing Creation and Praying for Peace – written by Sister Susan Richert
Living next to a Catholic Primary is a never-ending source of awe and wonder. St. Joseph's Primary school, Shirebrook, in Nottinghamshire, is a busy, exciting place to learn with so many happenings. During the season of Creation, the pupils came over to our garden to do some 'capacitar' wellness exercises - based on care for creation. They had time to get close to nature and the chance to see tomatoes on the vine, cucumbers growing huge, bees having lunch on the lavender, what happens when a plant is not watered and to watch helicopter seeds falling off the trees.

They also decorated the windowsills in the church - showing what God created on each day. They have now created a huge rosary on the sanctuary carpet. They gather there also for Exposition and time with the Lord in their own hearts.

Going into school and leading 'stillness' sessions with them and different ways of praying is a humbling experience.

Breakfast club is a chance to catch up with the children's gossip and what they did over the weekend. Conversations range from a five year old explaining to me the importance of caring for our common home by picking up rubbish, to mummy's baby seeming to take a long time coming. When asked when did Mummy say it would come, I was assured it was after Christmas and anyway it's a boy!! They have their breakfast and wash up after themselves. They show me the various pictures they have drawn or what they are playing with and why.



On Monday, October 7th, the school responded to the request of Pope Francis to pray for peace on this Feast of Our Lady of the Rosary. The pupils gathered in the hall sitting in circles around a focus.

The older children wrote a prayer on a dove and the little ones decorated a dove.

Activities, specific objectives and relevant policies (continued)

Working in Collaboration with others (continued)

Ministry of Justice (continued)

Having thought about the meaning of peace, some of the older children led everyone else in prayer. We prayed some of the rosary in the hall and then they waved their doves while chanting peace. The doves were then taken to St. Philip Neri Church in Mansfield where there was Exposition, Rosary and Mass for Peace.

On the doves were written prayers such as:

- ◆ God, please help us to create more peace with each other.
- ◆ Can we have peace? How could it be? Let's stop the wars and shooting for Our Father.
- ◆ God please help other people to stop wars.
- ◆ Please help me to use kind words.
- ◆ Peace means to be calm, quiet or maybe be still and feel living in harmony with others and supporting others who need it.
- ◆ God please help me to create world peace.

Friends of Nano – Associates

The Friends of Nano is an International Lay Movement for Mission. A network of women and men, who are committed, as Nano was, to 'act justly, love tenderly and walk humbly with God.'

Micah 6:8

The Friends of Nano include Associates, Co-workers and Partners in Mission. They share a common vision with the Presentation Congregation and seek opportunities to pray, act and celebrate together. In England, there is a core group who co-ordinate the Friends of Nano and also link with the wider international movement and with the Justice Desk.



Friends of Nano Core Group: L to R: Catherine Tompkin, Maria Owen (at back) Anne Marie Pearson, Consuelo Meneses, Sr Mary Deane

Activities, specific objectives and relevant policies (continued)

Working in Collaboration with others (continued)

Friends of Nano – Associates (continued)

During the year the Friends of Nano Core Group organised a number of events including Reflection Days in Matlock which were opened up to local Parishes to attend and also advertised within the Diocese. These days were well attended and received very positive feedback.

*On 8 June 2024, the theme of Reflection Day was **An Enduring Heart** and the speaker: Sister Anne Lyons PBVM.*

Sister Anne is a Presentation Sister living in Ireland and author of the book: The Story of Nano Nagle - A life lived on the Razor's Edge. She is also the Postulator for the promotion of the Cause for the Beatification of Venerable Nano Nagle.

Sister Anne reflected on the meaning of "an enduring heart". An enduring heart speaks of an enduring love. God who has called us is our source - the heart of holy mystery. Each of us is called to "manifest" a different face - not the one that is being shown today with wars and destruction rather one that shows peace and justice, love and compassion.

Comments made at the end of the day included:

- ◆ Thank you for a wonderful day. God bless you all
- ◆ Brilliant day! Really enjoyed the Nano talk re venerable and visiting the heritage centre
- ◆ Thank you - this gathering is what we need in this troubled world. Please can we do it again
- ◆ Everything - could have listened to Sister Anne forever! Nano would have been happy
- ◆ Very interesting; speakers excellent; well run; friendly and welcoming
- ◆ We had a beautiful day, thank you so much. Inspiring, meditative and wonderfully serene
- ◆ Truly reflective, contemplative day; food for the spirit totally and encouragement to live from the heart
- ◆ Thank you for the warm welcome and for hosting us - Wonderful. Sister Anne needs to make a recording of her beautiful talk and pop it on Spotify
- ◆ Excellent day, very informative and interesting
- ◆ Lovely, peaceful day; lovely to meet up with old friends and sisters known for many years. God bless you all
- ◆ It was a wonderful day, had a nice time here. Hope to come soon. Thank you
- ◆ I have been here many times, and I always love it. Thank you very much
- ◆ Would definitely come again

Activities, specific objectives and relevant policies (continued)

Working in Collaboration with others (continued)

Friends of Nano – Associates (continued)

- ◆ Thought provoking
- ◆ I have loved every minute – the fellowship, the inspiration, the sharing the love. Thank you
- ◆ Wonderful day; very inspirational and thought provoking; entwined hearts and how the love of God gives us the strength we need to share and love others.



Associates Retreat Day - Saturday 29 March 2025 -Theme: Sacred Heart - Icon of Hope Sister Angela and eleven of us left Acocks Green at 7.30am in 3 cars, heading for Matlock.

It was wonderful to arrive and see so many people gathered from various places in England. The welcome was great, and we enjoyed the refreshments. After signing in we began with prayer.

At 10.30am Father Jonathan Cotton informed us of Pope Francis' new encyclical on the Sacred Heart called "He loved us" and how it reflects on the wounded side of Christ as "the wellspring of the life of grace"; based on Pope Francis' letter, spoke of how devotion to the Sacred Heart enriched the spirituality of preachers, teachers, founders of religious congregations and the Saints who then spread the devotion all over the earth.

Father spoke of how the Pope's letter describes the spiritual journey and testimonies, prayers and devotions of many of the Saints devoted to the Sacred Heart.

Based on Pope Francis' letter we were given a hand-out - reflection on the new images of the Sacred Heart. We reflected on the images. We were then encouraged to share the image we are most drawn too.

At 11.30am we had silent personal reflection. We had the opportunity to walk around the beautiful gardens. I decided to waste time with God reflecting on the images. I sat for a while looking into the mystery; contemplating on what do I see when I look at the Sacred Heart. Drawn to the image of Jesus holding His heart in one hand and the other hand outstretched I came to the realisation that Jesus had given his heart in love, the love which moved Jesus to suffer and die for love of me/us.

The English Province of the Union of the Sisters of the Presentation of the Blessed Virgin
Mary Charitable Trust **29**

Activities, specific objectives and relevant policies (continued)

Working in Collaboration with others (continued)

Friends of Nano – Associates (continued)

Then we had our sandwiches and the opportunity to walk around again in the beautiful garden and admire God's creation. The fact that the sun shone added to the experience.

In the afternoon, we had the opportunity for prayers and confessions, followed by the celebration of Mass. A big thank you to Father Jonathan and to the Friends of Nano Core Group for organising this day.

Written by Aldora, Acocks Green Associate



Ongoing Training and Development Transformative Servant Leadership Programme - TSLP Sister Anna Manyonga became our first graduate of the TSLP from the Province. Sister Anna who lives and ministers in the Holy Land, was one of the twenty sisters who completed the programme in 2024. The final part of the programme was an intensive experience from 1 - 4 December 2024 on Zoom involving all participants, the co-ordinating team and invited speakers. On the final session, we were joined by the Congregational Leadership Team and the participants were awarded their certificates. This programme is a collaboration between the Presentation Sisters and St Paul's University, Ottawa and this is the fourth group of sisters to have completed the programme.

As part of the programme, participants were invited to reflect on their learning and each had to share something of this as part of the intensive experience. Sister Anna shares her learnings:



Activities, specific objectives and relevant policies (continued)

Working in Collaboration with others (continued)

Gifted with 3 Significant Powers

From January to December 2024, I participated in the Presentation Sisters Transformative Servant Leadership Program (PSTSLP) through the Institute for Transformative Leadership at Saint Paul University.



This program was a gift at the right time for me, particularly in this time of the war that is raging on in the Holy Land for more than a year. In this context, it is difficult to see hope at the end of such a tunnel of death, pain, grief, and sorrow, specifically as I am journeying closely with:

- ◆ Migrants, Asylum Seekers, and Palestinians who lost their jobs and struggle daily to afford the basics of life - pay rents, buy medication and food for their families,
- ◆ Israelis whose loved ones were killed on 7 October 2023, or are held hostage in Gaza for more than a year - without knowing whether they are still alive or dead,
- ◆ Palestinians whose loved ones have been killed in Gaza or are trapped in Gaza with very little to survive on.

I often saw my efforts to relieve pain and suffering as inadequate, faced with such enormous and giant needs.

The Transformative Servant Leadership program gifted me with the following 3 significant powers that spoke deeply to my situation,

1. **The Power of a clear vision** - influencing my perception and reality, reminding me that, the one who has a way to live, can bear almost any how - focusing on what is right and not on what is wrong.
2. **The Power of choice** - reminding me that I continue to wield the power to choose the path I take, in this Volatile, Uncertain, Complex, and Ambiguous (VUCA) context, no matter how dire, hopeless or helpless it feels.
3. **The Power of hope** - reminding me that even though I cannot do much to alleviate the situation, I can still 'do what I can, with what I have, where I am.' (Theodore Roosevelt).

Therefore, like the women in the concentration camp, I cannot stop the war; I cannot give the people back their jobs; I cannot bring back the hostages; and I cannot feed the multitude starving to death in Gaza, BUT, I can continue to be a compassionate loving presence, listening with my heart to those around me; I can continue to collect clothes and distribute to those in need; I can continue to assist the Migrants and Asylum Seekers with food and other basics of life; I can continue to consciously use lifegiving and dignity-rendering words in speaking of the conflict in the Holy Land – words that give both Palestinians and Israelis the humanity, dignity and respect that is due to them, as the beloveds of God, my brothers and sisters; I can continue to participate in places of encounter, where Israelis and Palestinians meet and engage with one another, in dignity and harmony in search of peace; I can continue to consciously choose life and create islands of sanity in the midst of this disruptive sea.

Activities, specific objectives and relevant policies (continued)

Working in Collaboration with others (continued)

Gifted with 3 Significant Powers (continued)

Christ is the light and hope in the darkness of our lives. Nano, the lady of the lantern, brought the light of Christ into the lives of those made poor in Cork, this is my call too. I am invited not to let the hopelessness and helplessness that characterize my current context to define my path and that of those I lead, but rather, to embody hope, to live by hope and love, to be a beacon of hope, a sign of hope, to speak words of hope in the midst of war, violence, death and grief. Indeed, the TSLP program affirmed me in the 'little' I am doing and gave me a new way of being in this war context.

As I reflect on my learning journey, I am filled with joy, hope, and gratitude for the person, leader that I have become and continue to grow into. The image that speaks very powerfully to me of this journey is the butterfly and its different stages of transformation (egg - caterpillar - pupa (chrysalis) - butterfly). Just like it is for the butterfly, this has been a journey of transformation and growth, struggle and hope, pain and joy, letting go and letting come, vulnerability and possibility. The program has given me wings and made me believe I can fly. I am aware that becoming a butterfly is not a one-time experience, but a lifelong process of commitment to continuous and gradual growth. I pray that I may be granted the graces I need on this journey of life, this time of continuous transition, this liminal space, that I may continue to have the courage to spread my wings and fly.

My heartfelt gratitude to the Unit Leadership Team for offering me this opportunity which gave me deep learnings, growth, and transformation. I am also thankful to my fellow participants, my mentor, and the program team who journeyed closely with me. May we continue to be leaders after the heart of Jesus.

Written by Sister Anna Kudakwashe Manyonga

Becoming a Presentation Sisters is a lifelong journey of growth in Christ...

This calls for daily and ongoing renewal *Constitutions* - 28

As part of our call for ongoing renewal and development, the sisters participated in a workshop from 9-11 July led by Father Hugh Lagan a priest with the Society of African Missions and a clinical psychologist with a focus on spiritual and emotional well-being, managing loss and bereavement and living with change. The theme was *Living your One, wild and Precious life*.



Though we live in a world that dreams of ending that always seems about to give in, something that will not acknowledge conclusion insists that we forever begin.

Brendan Kennelly

Our lives are shaped by endings; some necessary, some are thrust on us and others that happen when we choose to let go. Our lives are also shaped by what we choose to begin. Our workshop led by Father Hugh Lagan on the theme: Living your One Wild and Precious Life reminded us that it is never too late to begin again. The three days was an invitation to reconnect with the source of our life; of love; of truth; of goodness - the seed of divinity that is deep within us all.

Activities, specific objectives and relevant policies (continued)

Working in Collaboration with others (continued)

Gifted with 3 Significant Powers (continued)

Reflecting on the journey of the second half of life we were reminded that it is a journey of coming home to ourselves and to God. A journey of letting go, of trusting in God and deepening what our hearts and soul already knows. As Women of God, we are constantly in the dance of vulnerability and possibility as we weave a New Story.

“To risk the journey and the face of the future-is simply to walk in faith. ...But always, both in our knowing and in our unknowing, we are escorted into tomorrow by Love, who gives us everything we need.” Doris Klein

The interweaving of the workshop with the Congregational Gathering (CG) 2024 Direction Statement was both inspiring and challenging, calling us to continue to journey together in a deeper way and where *Beckoned by Nano's spirit, At the wild unfinished edges, We encounter Mystery.* [Direction Statement CG2024](#)



Volunteers

Throughout the year, many of the sisters give their time to assist those in need. The majority of the Sisters receive no financial reward for this work which contributes to the overall achievement of the charity's objectives. In addition, members are involved in administering the work of the Unit and the Charity – without their contribution the Charity would not be able to function as effectively as it does.

Sisters often do voluntary work in more than one area. This is reflected in the table below as more sisters than are in the province are in these figures. Other sisters receive a small/nominal stipend for the ministry they undertake. These ministries are usually in the areas of Parish; Catechesis; Spirituality.

Activities, specific objectives and relevant policies (continued)

Working in Collaboration with others (continued)

Volunteers (continued)

Area	No. of volunteers	Approx. hours volunteered (over the year)
Hospital visiting, hospice/housebound	30	7,000
Chaplaincies, Care Home and hospital	4	1,500
General Parish Ministry/ Children's Groups	25	8,000
Spirituality	15	3,000
Refugee service	1	250
Outreach to women / Homeless	4	400
Outreach to local community	35	7,000
Administration	9	6,000
Communications	4	500
Vocation/Formation	3	200
Associates	12	1,300
Justice And Peace	18	850
Ministry to Travellers	3	2,200
Carers of sisters within own community	8	6,000
Counselling	1	40
Heritage Centre/Archives	2	220
Support of Other Charities (i.e., Cafod etc.)	2	240
Total		44,700

An example of this is that Sister Eleanor has been working with Cafod as a school's volunteer for about five years. Cafod (Catholic Agency for Overseas Development) is an international development charity which aims to reach out to people living in poverty with practical help, whatever their religion or culture. They also campaign for global justice, so that everyone can live their life to the fullest. Cafod's aims and values are very much aligned with the values of the Presentation Sisters.

'As a school's volunteer, I visit primary schools, mainly in the Birmingham Diocese, and offer assemblies and workshops on specific themes using the resources provided by the Cafod schools team. I have recently given assemblies on themes such as the Amazon rainforest and the effect of climate change on people living in Uganda. There have been interactive workshops where children have imagined what it would be like to live without easy access to water and opportunities to design posters based on the UN rights of the child. I have particularly enjoyed giving workshops to individual classes on Laudato Si and the children have made promises to care for the environment.

I enjoy working with children who are already aware that we are all one family and that we need to take care of each other and care for the earth, our home.'

Activities, specific objectives and relevant policies (continued)

Grants, donations and support of missionary work and ministry

Grants and donations

Grants and donations are made by the trustees in consultation with other members of the Unit. In the main, the charity supports the work of the Presentation Sisters in those overseas countries where there is the most need.

In January we also gave a donation to a Parish where we are linked, to support a youth pilgrimage to Rome in April.

The trustees continue to give financial support to United Kingdom organisations whose work is within the objects of the charity e.g., CAFOD, C.A.P. and Friends of the Earth. The Unit also supports short term requests for charity in relation to natural disasters, famine etc.

The charity does not regard itself as a grant making entity and applications for grants and donations are not invited.

Use of our buildings for networking and collaboration

Our houses are used by others for various activities. In this way, we share our resources with the local community.

Examples of such uses are:

- ◆ Each week the Main Hall in the Convent in Matlock is used by the Care Centre for activities for the residents and for in-service training.
- ◆ Many of our houses are regularly used by organisations, Churches and charity groups e.g. "Assisted Reading for Children" and local mother and toddler groups and refugees.
- ◆ Our buildings have also been used by local churches for joint fundraising events for needs abroad.
- ◆ SVP groups and ladies' clubs meet on a regular basis and Parishes run various catechetical programmes in several of our houses.
- ◆ People are welcome to join in prayer or to use our chapels for prayer. Coffee mornings are held. Prayer groups, student groups, and various other groups also use our facilities.

The following Diocesan and Parish organisations hold meetings within the charity's properties and make use of its facilities:

- ◆ Friends of Nano - Presentation Associates
- ◆ Justice and Peace Groups
- ◆ LGBTQ groups
- ◆ Choir Practices.

Activities, specific objectives and relevant policies (continued)

Grants, donations and support of missionary work and ministry (continued)

Grants and donations (continued)

In addition, the following religious instruction programmes take place:

- ◆ Preparation for Baptism
- ◆ Preparation for Confirmation
- ◆ R.C.I.A.

Solidarity Fund set up in 2001

We contribute to the Solidarity Fund which has been set up by the Congregational Leadership Team to further the work among the poor and to assist in the provision of training for ministry in new situations. In this way, while we ourselves are an ageing group, we can support the younger and more active members of the Congregation to continue our ministry of bringing “good news to the poor” in those parts of the world which are desperately poor.

Vocations

While it is the responsibility of every member of the Congregation to pray for and encourage women to think about our way of life, there is a Vocation Commission which consists of three sisters. The team meets regularly to plan Vocation Days and support communities in their responsibility of praying and encouraging women to think about this way of life.

They also respond to enquiries and accompany some who request help in discerning their vocation in life. They organise events for young adults to deepen their Faith and prayer life and thus discover their vocation in life. Events include retreats, Lectio Divina groups, Flame Rally, World Youth Events and Bible Study.

As a member of the Vocations Commission, Sister Mary Deane shares some events that she has been involved in during the year as part of her ministry.

Living Joyfully Event

This event organised by the National Office for Vocations, is an opportunity for students to meet with religious and to share something of our vocation story and life.

This celebration of religious life took place on zoom on the 16 and 17 April. Over 2,000 students participated over the two days and about 25 religious from various Congregations.



It was a great way to engage with students in our secondary schools and to meet other religious. Each session lasted approximately an hour, with between 3 or 4 religious depending on the size of the group. We each shared briefly about our call and life and then gave time to answering questions. It is always an enriching and lifegiving experience and it was good to be part of it.

Activities, specific objectives and relevant policies (continued)

Vocations(continued)

Flame

I accompanied some young people from the Parish to the Flame 25 Event at the OVO Arena in Wembley on 15 March. A number of them were sponsored by the Presentation sisters.

As Pola remarked on the way home - it was "Awesome." We joined with over 10,000 young people from England and Wales for an incredible event - part concert and conference! A mix of singers, dancers, musicians, interviews, preaching and adoration. It was noisy, energising and faith filled and came away feeling energised and inspired by the faith and witness of so many people.



Sr Mary Deane with some young people from the Parish that she accompanied to Flame.

Pilgrims of Hope Careers Week at St Martins Catholic Academy

When asked to give a talk as part of the Pilgrims of Hope Careers week in Divinity, my first reaction was not very enthusiastic to be honest but I'm really glad I did respond positively to the invitation. Since it was 7 March, the day before International Women's Day, I was asked to focus on being a woman of hope as a Religious Sister. First of all, it was good to reflect on what it means for me personally and I was surprised and challenged by the engagement and questions from the students.



"Sister Mary helped me to understand about what being a nun really is, and how they help people around the world".

Lisa, Year 10



"Sister Mary showed us how to be a pilgrim of hope and the ways to show stewardship truly and lead a positive life".

Chloe, Year 10

Activities, specific objectives and relevant policies (continued)

Investment policy

The charity's investments are managed by professional investment managers under a discretionary investment agreement. The investment strategy is set by the trustees, with help and advice from the Finance Team and Investment Manager and takes into account income requirements, risk profile and the investment managers' views of the market prospects in the medium term.

The policy is to maximise total return through a diversified portfolio whilst providing a level of income advised by the trustees from time to time.

The charity has an ethical policy precluding investment in any company which, after reasonable enquiry, clearly has significant profits from an activity which is contrary to the objectives of the Christian Church. The charity has divested from Fossil fuel companies in line with the Congregational Finance policy and mission focus.

The performance of the portfolio and the charity's investment strategy are reviewed by the trustees and the Congregational Bursar who meet with the investment managers annually.

Fundraising policy

The charity aims to achieve best practice in the way in which it communicates with donors and other supporters. The charity takes care with both the tone of its communications and the accuracy of its data to minimise the pressures on supporters. It applies best practices to protect supporter's data and never sells data; it never swaps data and ensures that communication preferences can be changed at any time. The charity and the group manage its own fundraising activities to react to and investigate any complaints regarding its fundraising activities and to learn from them and improve its service. During the year, the charity received no complaints about its fundraising activities.

Financial report for the year

Income and expenditure

Total income for the year was £3.82 million (2024: £3.24 million), of which £1.13 million (2024: £1.13 million) comprised voluntary income. This included £1.06 million (2024: £1.06 million) in respect to sisters' pensions. A further £1.99 million (2024: £1.75 million) of income comprised fees for care services.

During the year the charity incurred expenditure of £3.97 million (2024: £3.75 million), of which £1.56 million (2024: £1.5 million) related to the upkeep of the sisters and enabling them to carry out their charitable work. £2.2 million (2024: £2.1 million) was spent on providing care services at Matlock. Donations in support of miscellaneous charitable activities, including to the work of the Congregation overseas, amounted to £134,960 (2024: £97,904).

The net expenditure for the year before investment gains totalled £145,731 (2024: £515,477). Net investment losses totalled £429,375 (2024: net investment gains £516,917) and resulted in a decrease in funds over the year of £575,106 (2024: increase in funds of £1,440).

Financial report for the year (continued)

Income and expenditure (continued)

The charity's investments are managed by Rathbone Investment Management Limited. They have invested in accordance with the Trustees' (and the Congregation's) investment policy set out above and in compliance with the ethical guidelines given to them. The investments together with cash held by the investment managers for investment had a market value of £12,812,659 at 31 March 2025.

During the year, the charity's listed investments achieved an income yield of 1.5% and a capital yield of approximately minus 3.4%. Further details of the investment portfolio are included in note 12 to the attached accounts.

The Trustees continue to take a long-term view and believe their investment policy remains appropriate.

Financial position and reserves policy

The balance sheet shows total reserves of £21.6 million (2024: £22.2 million). £84,153 (2024: £73,599) of these reserves represent restricted funds held primarily for the Congregation's missions overseas.

Of the balance, £7.92 million (2024: £8.25 million) is represented by tangible fixed assets used to support the work of the sisters. A further £12 million (2024: £12 million) represents a retirement reserve designated to provide income to communities for the care of elderly sisters. It is the charity's policy to designate as a separate fund an amount to provide for the sisters in the future, as they are wholly dependent on the charity, and to give the level of resources necessary to continue to support their work. Given the increasing age profile of the sisters and the lack of new vocations this sum will only provide modest resources to look after them.

The Trustees have examined the requirement for free reserves i.e. those unrestricted funds not invested in tangible fixed assets, designated for specific purposes or otherwise committed. The Trustees consider that, given the nature of the charity's work, the level of free reserves should be approximately six to twelve months' annual expenditure, to provide for contingencies and unevenness in future income. At the date of the balance sheet, free reserves amounted to £1.58 million (2024: £1.84 million) which is within the amount implicit in the policy. The Trustees will continue to monitor reserves but do not regard the overall reserves of the charity as inadequate or excessive.

The charity's assets

Acquisitions and disposals of fixed assets during the year are recorded in the notes to the accounts.

Future plans

It is the intention of the Trustees to meet the following objectives over the next two to five years.:

- ◆ To implement the decision made in January 2025 by the Trustees to become a Charitable Incorporated Organisation (CIO) by 31 March 2026 .
- ◆ To continue to care for the sisters and enable them to carry out their pastoral work and ministry. We will continue to focus on the poor and marginalised and reaching out to as many as possible.
- ◆ To continue to operate our Care Centre and provide the highest possible quality of care for the residents.
- ◆ To continue to aim to achieve occupancy rates of 95+% within the Care Centre.
- ◆ To meet the care requirements laid down by law within the Care Centre and ensure the reports of the CQC are of an excellent standard.
- ◆ To continue a rolling programme of refurbishment for the Care Centre including an upgrade of the IT Provision.
- ◆ To continue to employ high quality staff in the Care Centre and elsewhere and ensure that they receive appropriate and relevant training.
- ◆ To monitor the needs of the sisters as they grow older and, if necessary, adapt the charity's plans in respect of property needs and the provision of care to elderly members.
- ◆ To work with the Congregational Bursar in looking at restructuring our finances in order to ensure continued good stewardship.
- ◆ To support the Congregation's missions overseas.
- ◆ To ensure that on-going formation is provided for our sisters and our co-workers.
- ◆ To ensure that the policy of sharing our resources is continued.
- ◆ To seek and encourage new members to the Congregation.

Governance, management and community structure

Governance

The trustees are incorporated under the Charities Act 2011. They are appointed by the Unit Leader and their number is specified in the Trust Deed. At any one time, there must be a minimum of five trustees. The Unit is administered by the Unit Team Leader and the Unit Council, along with other trustees including the Province Bursar. The Unit Team leader and Unit Council constitute the leadership team of the Unit.

Governance, management and community structure (continued)

Governance (continued)

In assisting and supporting the Unit, the trustees work closely as a team and meet regularly throughout the year. The members of the Unit leadership Team are elected by members of the English Province or are appointed by the Congregational Leadership Team (CLT) following consultation with members of the English Unit. The Unit Leadership Team are accountable to the Congregational Leadership Team.

The number on the Unit Leadership Team and their term of office is decided by sisters in the Province following consultation and is confirmed by the CLT. Due to close collaboration with the Leadership teams in Ireland it is recommended that their terms of office coincide. The leadership Team was appointed by the CLT and their term of office was from September 2021 until 31 July 2025. A new team has been elected to take office from 1 August 2025. On being elected/appointed, the incoming Unit Leadership Team is required to spend some time with those leaving office. They also meet with the Unit's legal, financial, investment and property advisers to obtain a full briefing of their responsibilities and the charity's position.

Each community in England is visited regularly by members of the Leadership Team and there is a system of accountability operational in the Unit ensuring that the Team is aware of developments in the work and life of each community. The Unit Team work closely with the leaders of Communities and Community Groupings to form an extended Leadership Team. They have regular meetings and ensure that the care of sisters and the ministries undertaken by the sisters is kept under review.

Management

Sister Eileen Keating was appointed as Unit Leader in August 2021 for a second term having served as leader since 2014. Also appointed were the council members - Sisters Mary Deane and Eleanor O'Gorman, who together constitute the leadership team of the Unit. Sister Eileen Keating died on 11 September 2024, following a long illness.

Sister Mary Deane as Assistant Unit Leader assumed responsibility as Unit Leader in accordance with the Constitutions of the Union of Sisters of the Presentation of the Blessed Virgin Mary. This appointment was confirmed by Sister Sharon Fagan, the Congregation Leader, and Sister Mary Deane was appointed Unit Leader with effect from 12 September 2024 until 31 July 2025. Sister Mary was elected as Province Leader at the Province Assembly in May 2025. Sisters Susan Richert and Janette Brown were elected as the council members, who along with Sister Mary constitute the new leadership Team with effect from 1 August 2025 until 31 July 2029.

The names of the trustees who served during this year 2024-2025 are set out as part of the reference and administrative details on page 1 of this annual report and accounts. Brief biographical details on each trustee in office at 31 March 2025 are given below.

Governance, management and community structure (continued)

Management (continued)



Sr Mary Deane made her first profession in 1987, she is resident in Shirebrook and has lived in communities in Redditch, Coventry and Nottingham. She has worked in a number of ministries including teaching, school and university chaplaincy. From 2006-2012 she served on the Congregational Leadership Team and from 2012-2018 was Congregational Leader. Until recently she was involved with vocation ministry and was the Link sister with the Friends of Nano in the Province.



Sister Eleanor O'Gorman made her first profession of vows in 1985, she has lived in communities in Scunthorpe, Acocks Green, Glossop and Gorton and has taught in primary schools in Scunthorpe, Birmingham and Stockport. She is currently living in Acocks Green where she is doing voluntary work with Cafod and at Tabor House, a centre for people



Sister Anne Marie Buckley is resident at Presentation Convent in Matlock. She has retired from a very active life in teaching and Pastoral Ministry. She continues to visit residents in the Care centre in Matlock and is engaged in prayer ministry.



Sister Angela Murphy is resident in Acocks Green, Community, Birmingham. Sister Angela has wide experience of leadership in the Province and in youth and vocation ministry. She continues to minister within the local Parish and has a ministry in prayer and spirituality.



Sister Bernadette Healy lives in Derby and is a member of the leadership Team for the Matlock community. She has taught in primary schools in Bicester, Huddersfield and Birmingham and currently has pastoral responsibility for the Traveller community in the Nottingham Diocese.

Governance, management and community structure (continued)

Trustees' responsibilities

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

The law applicable to charities in England and Wales 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 United Kingdom 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 adequate accounting records that are sufficient to show and explain the charity's transactions and 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, the applicable Charity (Accounts and Reports) Regulations and the provisions of the charity's trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Structure and management reporting

The trustees are ultimately responsible for the policies, activities and assets of the charity. The Unit Leadership Team meet once a month to review developments and make decisions. Since there was only two members of the Unit Leadership Team from September 2024, it was agreed to that the full complement of Trustees would meet regularly for updates and for making major decisions. These meeting took place both on Zoom and face to face.

This was particularly important in the decision to move towards becoming a **Charitable Incorporated Organisation - CIO**.

Governance, management and community structure (continued)

Structure and management reporting (continued)

The Trustees, the leaders of communities/community groupings, Karen Roberts (Financial Advisor) met with Amanda Francis, (Consultant) who outlined the benefits and process of becoming a CIO. Following this meeting on 10 December 2024, Amanda Francis, met with the sisters on zoom in January 2025, and having also consulted with the Congregational Leadership Team, permission was given to move forward with the decision to become a CIO. It is hoped that this process will be completed by March 2026.



Meeting of Amanda Francis (Consultant) with the Trustees, the leaders of communities/community groupings and Karen Roberts (Financial Advisor)

The full board of trustees also meet with the charity's professional advisers including property consultants, accountants, and investment managers at least once a year. The day-to-day management of the charity's activities and the carrying out of its policies is delegated to the appropriate members of the Congregation.

Community structure

On 31 March 2025, the Province consisted of 51 sisters. For the most part the sisters live in small communities of between three and four sisters. However, we have one community of six members and another community of 20 sisters. Five sisters live on their own for the sake of mission. The largest community has named leadership while other communities work on a collaborative model and have a designated Leader.

Presentation Sisters Care Centre

The Charity owns and operates a highly regarded Care Centre for older people within the Matlock Community. The Care Centre is open to all regardless of belief.

The Care Centre fulfils the aim of the charity to both provide an appropriate care facility for sisters of the Congregation and for members of the public who need care and would benefit from a peaceful and religious environment. Whilst fees are charged for the Care Centre, assistance is given for residents to be able to claim state assistance, subject to Government qualification criteria. Top-Up fees are reduced when there is an inability to pay and any specific cases of hardship are put to the trustees if the resident does not qualify for state assistance. All residents have access to pastoral services provided by the sisters and the on-site chapel is available for services and contemplation.

Governance, management and community structure (continued)

Presentation Sisters Care Centre (continued)

The Registered Manager of the Care Centre during the year was responsible for the day-to-day administration. This post is held by Mrs Jayne Carnall. Medical care was supervised by the Lead Nurse, Jo Green and the clinical governance is overseen by Chris Earl.

A Management Board, chaired by Sister Eleanor O'Gorman, meets every three months. The Board reports to the Province Leader on matters regarding residents, finance and premises. The Chair of the Board, the Registered Manager and Lead Nurse and/or Clinical Practice Facilitator, attend these meetings. Members of the Province, Sisters Mary Deane and Bernadette Healy along with Ms Jacquie Scott (and until March 2025 Sister Siobhan O'Keefe SHJM) are members of this Board. Sister Mary Deane represents the Province Leadership Team on this Board. The Care Quality Commission liaises with the Province Leadership.

The charity has a serious and continuing commitment to the care, support and maintenance of the members who are being cared for in our Care Centre at Matlock. We continue to be aware of the increasing age and fragility of the members of the Province and seek always to find the best ways to care for them.

Key management personnel

The trustees consider that they comprise the key management personnel of the charity in charge of directing and controlling, running and operating the charity on a day-to-day basis.

As noted above, the day-to-day operations of the Care Centre are overseen by a Management Board chaired by Sister Eleanor O'Gorman who along with the Registered Manager, the Lead Nurse and Clinical Practice Facilitator, oversee the running of the Care Centre and report to the Province Leadership Team on matters regarding residents, finance and premises.

The pay of the Registered Manager, Lead Nurse and the Clinical Practice Facilitator are reviewed annually by the trustees and the members of the Management Board. Their pay generally is increased in line with average earnings within the Care Centre.

Working with other organisations

The charity works closely with a number of other charities and public bodies in various fields to achieve its mission. In some instances, sisters are employed by organisations whilst in other instances the relationships are more informal. In working together, the sisters further the Congregation's mission. They also work in coordination with other organisations in order to further their objectives in relation to care and education.

Examples of other organisations with which members cooperate are as follows:

- ◆ Roman Catholic Diocese of Nottingham/Salford/Birmingham/Clifton/Hallam
- ◆ Education Authorities e.g., Manchester/ Derbyshire
- ◆ Father Hudson's Care, St Luke Institute
- ◆ Church Action on Poverty/ CAFOD / NJPN / Pax Christi / FaithJustice

Governance, management and community structure (continued)

Presentation Sisters Care Centre (continued)

Working with other organisations (continued)

- ◆ Conference of Religious of England and Wales - COR
- ◆ MIND / ICAP
- ◆ Capacitar
- ◆ Hope Projects

Risk management

In line with the requirement for trustees to undertake a risk assessment exercise and report on the same in their annual report, the trustees have looked at the risks the Congregation currently faces, including those in the Care Centre, and have reviewed the measures already in place, or needing to be put in place, to mitigate them.

The following main areas where risks may occur have been identified:

Governance and management

The Unit Team Leader works closely with her team ensuring that responsibility and information regarding the charity is shared. This mitigates the risk of one key person holding all the responsibility and information for the charity. Management of key areas of the charity (care of the elderly sisters, the Care Centre, finance) have been delegated to the appropriate members of the Congregation and competent individuals who are accountable to and work closely with the trustees.

Financial

All local houses are accountable to the Unit Bursar and the Finance Team regarding finance and resources. The Unit Leadership Team meet once a month to review developments and make decisions. As regards the Care Centre, a Management Board meets every three months. The Board reports to the Unit Leadership Team on matters regarding residents, finance and premises.

All sisters and staff receive training and formation in appropriate skills. It also ensures the good use of the charity's resources and members are enabled to learn new skills and constantly update their training in the light of new developments.

Properties and investments

The principal financial assets of the charity are its properties and investment portfolio. The Unit Bursar oversees the maintenance and management of properties in conjunction with the trustees and advisers. All the properties are fully insured with a reputable insurance company. The investment portfolio is subject to market fluctuations and so is managed by a competent and reputable firm of investment managers who act in accordance with the trustees' investment policy which is reviewed annually. The trustees meet annually with the investment managers to review the performance of the portfolio and to ensure that funds are at appropriate levels to meet the charity's needs both now and into the future.

Governance, management and community structure (continued)

Care of sisters

An analysis of the age profile of the sisters in the Unit shows that the main group of sisters are in their 70s and 80s. Recent experience has shown that this is the group likely to have unexpected health issues. Therefore, the planning for the future needs to take provision for the future of these sisters into account alongside the more obvious needs of the more elderly. The trustees are aware of their legal and moral responsibility to care for their members. None of the sisters has resources of her own as all pensions, salaries and other income have been donated to the charity under a Gift Aid compliant Deed of Covenant. Key to managing this risk is: ensuring there are financial resources available to finance this care now and into the future by setting aside designated funds for this purpose; also, regular reviews of the ministries and needs of the sisters in order to identify and address those needing more support or care.

Care Centre

The Care Centre operates in a highly regulated field of activity and as such is subject to regular inspection by a number of agencies. The result of this degree of scrutiny is that operational risk policies are very well developed in the areas of quality of service, health and safety of residents and employees and employment issues. The Management Board, the Registered Manager, the Lead Nurse and Clinical Practice facilitator with experience of running health care organisations advise the trustees on the myriad of clinical, care and other risks associated with the operation of the Care Centre including, for example, safeguarding (see below); the chronic shortage of qualified nurses and care assistants; the impact of the changes in the provision of care funding and the changing regulatory environment including alterations to the inspection regime of the Care Quality Commission and the need for specific written policies.

The Care Centre complies with all regulations regarding fire alarms, emergency lighting, fire doors, emergency exits, and procedures for alerting the fire brigade. Fire tests are regularly carried out and handbooks are provided for workers. In all our properties, a qualified engineer annually inspects our machinery and plant equipment.

Safeguarding

Sisters engaged in any ministry in Great Britain and all those who work or volunteer for the charity and work with children or vulnerable adults (including our elderly sisters) must obtain clearance from the Disclosure and Barring Service (DBS).

The sisters commit themselves to care in this area, guided by the Unit Safeguarding Policy. This policy is in alignment with the Catholic Church and Statutory Services in this Country. These provide the necessary framework for those who exercise ministry involving any work with children, young people and adults at risk.

Governance, management and community structure (continued)

Employees, volunteers and members of the Congregation

The trustees wish to record their recognition of the professionalism and commitment of all their staff, volunteers and the individual members of the Province and Congregation. Their dedication and positive approach are very much appreciated.

Signed on behalf of the trustees:

Mary Deane PBVM

Trustee

Approved by the Trustees on: 18 September 2025

Independent auditor's report to the Trustees of The English Province of the Union of the Sisters of the Presentation of the Blessed Virgin Mary Charitable Trust

Opinion

We have audited the accounts of The English Province of the Union of the Sisters of the Presentation of the Blessed Virgin Mary Charitable Trust (the 'charity') for the year ended 31 March 2025 which comprise the statement of financial activities, the balance sheet, the statement of cash flows, the principal accounting policies and 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 31 March 2025 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.

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.

Emphasis of matter – Accounts prepared on a basis other than going concern

We draw attention to the principal accounting policies on pages 57 and 58 which state that the trustees of The English Province of the Union of the Sisters of the Presentation of the Blessed Virgin Mary Charitable Trust have prepared the accounts on a basis other than going concern. This is due to the trustees' decision to transfer of all activities, assets and liabilities of the unincorporated charity to a newly formed Charitable Incorporated Organisation on 31 March 2026. We consider that no adjustment to the book value of assets or liabilities is required as a result of this basis of preparation. Our opinion is not modified in respect of this matter.

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

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 course of 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 this gives rise to a material misstatement in the accounts themselves. 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

In the light of the knowledge and understanding of the charity and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' report.

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 requires us to report to you if, in our opinion:

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

Responsibilities of Trustees

As explained more fully in the Trustees' responsibilities statement set out on page 43, 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

We have been appointed as auditor under section 144 of the Charities Act 2011 and report in accordance with the Act and relevant regulations made of having effect thereunder.

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 to irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud, is detailed below.

How the audit was considered capable of detecting irregularities including fraud

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;
- ◆ We identified the laws and regulations applicable to the charity through discussions with management and Trustees and from our knowledge and experience of the charity sector;
- ◆ We focused on specific laws and regulations which we considered may have a direct material effect on the accounts or the activities of the charity. These included but were not limited to the Charities Act 2011; Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable to the United Kingdom and Republic of Ireland (FRS 102) (effective 1 January 2019); the Care Act 2014 and related legislation/regulations; and
- ◆ We assessed the extent of compliance with the laws and regulations identified above through making enquiries of management and those charged with governance and review of minutes of Trustees' meetings.

Auditor's responsibilities for the audit of the accounts (continued)

How the audit was considered capable of detecting irregularities including fraud
(continued)

We assessed the susceptibility of the charity's financial statements to material misstatement, including obtaining an understanding of how fraud might occur, by:

- ◆ Making enquiries of management and Trustees as to where they considered there was susceptibility to fraud, their knowledge of actual, suspected and alleged fraud; and
- ◆ Considering the internal controls in place to mitigate risks of fraud and non-compliance with laws and regulations.

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

- ◆ Performed analytical procedures to identify any unusual or unexpected relationships;
- ◆ Tested and reviewed journal entries to identify unusual transactions;
- ◆ Carried out substantive testing of expenditure;
- ◆ Assessed whether judgements and assumptions made in determining the accounting estimates were indicative of potential bias; and
- ◆ Investigated the rationale behind significant or 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:

- ◆ Agreeing financial statement disclosures to underlying supporting documentation;
- ◆ Reading the minutes of meetings of Trustees and the Care Centre Management Board; and
- ◆ Enquiring of 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 financial statements is located on the Financial Reporting Council's website at www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Independent auditor's report 31 March 2025

Use of this report

This report is made solely to the charity's Trustees, as a body, in accordance Part 4 of the Charities (Accounts and Reports) Regulations 2008. 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 Audit LLP

Buzzacott Audit LLP
Statutory Auditor
130 Wood Street
London
EC2V 6DL

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

23 September 2025

Statement of financial activities Year to 31 March 2025

	Notes	Un- restricted funds £	Restricted funds £	Total funds 2025 £	Un- restricted funds £	Restricted funds £	Total funds 2024 £
Income from:							
Donations and legacies	1	1,064,235	63,974	1,128,209	1,069,123	65,767	1,134,890
Investments and interest receivable	2	305,287	86	305,373	334,252	81	334,333
Charitable activities							
. Charges for care services		1,994,363	—	1,994,363	1,752,022	—	1,752,022
Other sources:							
. Care Centre grants		2,414	—	2,414	6,502	—	6,502
. Surplus on disposal of tangible fixed assets	3	373,351	—	373,351	4,599	—	4,599
. Miscellaneous		17,117	—	17,117	3,072	—	3,072
Total income		3,756,767	64,060	3,820,827	3,169,570	65,848	3,235,418
Expenditure on:							
Raising funds							
. Investment manager's fees		62,780	—	62,780	61,647	—	61,647
Charitable activities							
. Support of members of the Congregation and their ministry	4	1,564,600	—	1,564,600	1,513,385	—	1,513,385
. Provision of care services	5	2,202,907	1,311	2,204,218	2,077,422	537	2,077,959
. Grants and donations in support of miscellaneous charitable purposes	6	82,765	52,195	134,960	59,099	38,805	97,904
Total expenditure		3,913,052	53,506	3,966,558	3,711,553	39,342	3,750,895
Net (expenditure) income before net investment (losses) gains	8	(156,285)	10,554	(145,731)	(541,983)	26,506	(515,477)
Net investment (losses) gains	12	(429,375)	—	(429,375)	516,917	—	516,917
Net (expenditure) income and net movement in funds		(585,660)	10,554	(575,106)	(25,066)	26,506	1,440
Reconciliation of funds:							
Total funds brought forward at 1 April 2024		22,090,848	73,599	22,164,447	22,115,914	47,093	22,163,007
Total funds carried forward at 31 March 2025		21,505,188	84,153	21,589,341	22,090,848	73,599	22,164,447

All of the charity's activities comprised continuing operations during the above two financial years.

Balance sheet 31 March 2025

	Notes	2025 £	2025 £	2024 £	2024 £
Fixed assets					
Tangible assets	11		7,924,733		8,250,307
Investments	12		<u>12,812,659</u>		<u>13,305,800</u>
			20,737,392		21,556,107
Current assets					
Debtors	13	329,273		279,192	
Cash at bank and in hand		<u>832,488</u>		<u>626,351</u>	
		1,161,761		905,543	
Liabilities					
Creditors: amounts falling due within one year	14	<u>(249,812)</u>		<u>(217,203)</u>	
Net current assets			911,949		688,340
Total assets less current liabilities			21,649,341		22,244,447
Creditors: amounts falling due after more than one year					
	15		<u>(60,000)</u>		<u>(80,000)</u>
Total net assets			21,589,341		22,164,447
The funds of the charity:					
Restricted income funds	16		84,153		73,599
Unrestricted income funds					
. Tangible fixed assets fund	17	7,924,733		8,250,307	
. Designated funds	18	12,000,000		12,000,000	
. General fund		<u>1,580,455</u>		<u>1,840,541</u>	
			21,505,188		22,090,848
			21,589,341		22,164,447

Approved by the Trustees and signed
on their behalf by:

Trustee - Sister Susan Richert

Date: 18 September 2025

Statement of cash flows Year to 31 March 2025

	Notes	2025 £	2024 £
Cash flows from operating activities:			
Net cash used in operating activities	A	(606,317)	(514,345)
Cash flows from investing activities:			
Investment income and interest received		312,067	329,313
Proceeds from the disposal of tangible fixed assets		660,622	4,600
Purchase of tangible fixed assets		(223,660)	(798,219)
Proceeds from the disposal of investments		1,263,298	1,667,945
Purchase of investments		(1,548,212)	(773,765)
Net cash provided by investing activities		464,115	429,874
Change in cash and cash equivalents in the year		(142,202)	(84,471)
Cash and cash equivalents at 1 April 2024	B	1,108,312	1,193,160
Change in cash and cash equivalents due to exchange rate movements		(341)	(377)
Cash and cash equivalents at 31 March 2025	B	965,769	1,108,312

Notes to the statement of cash flows for the year to 31 March 2025.

A Reconciliation of net movement in funds to net cash provided by used in operating activities

	2025 £	2024 £
Net movement in funds (as per the statement of financial activities)	(575,106)	1,440
Adjustments for:		
Depreciation charge	271,992	275,931
Losses (gains) on investments	429,375	(516,917)
Investment income and interest receivable	(305,373)	(334,333)
Surplus on disposal of tangible fixed assets	(373,351)	(4,599)
Exchange losses	341	377
(Increase) decrease in debtors	(56,775)	105,210
Increase (Decrease) in creditors	2,580	(41,454)
Net cash used in operating activities	(606,317)	(514,345)

B Analysis of cash and cash equivalents

	2025 £	2024 £
Cash at bank and in hand	832,488	626,351
Cash held by investment managers	133,281	481,961
Total cash and cash equivalents	965,769	1,108,312

No separate reconciliation of net debt has been prepared as there is no difference between the net cash (debt) of the charity and the above cash and cash equivalents.

Principal accounting policies 31 March 2025

The principal accounting policies adopted, judgements and key sources of estimation uncertainty in the preparation of the accounts are laid out below.

Basis of preparation

These accounts have been prepared for the year to 31 March 2025 with comparative information provided for the year to 31 March 2024.

The accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant accounting policies below or the notes to these accounts.

The accounts have been prepared in accordance with 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 United Kingdom and Republic of Ireland (Charities SORP FRS 102), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The charity constitutes a public benefit entity as defined by FRS 102.

The accounts are presented in sterling and are rounded to the nearest pound.

Critical accounting estimates and areas of judgement

Preparation of the accounts requires the Trustees to make significant judgements and estimates.

The items in the accounts where these judgements and estimates have been made include:

- ◆ estimating the useful economic life of tangible fixed assets for the purposes of determining the annual depreciation charge;
- ◆ assessing the probability of the receipt of legacy income;
- ◆ determining the apportionment of expenditure between governance and support costs and between support costs and the various categories of expenditure on charitable activities;
- ◆ assessing the recoverability of outstanding debtors especially in respect to care fees and loans advanced to thirds parties;
- ◆ the assumptions applied in determining the size of the sisters' retirement reserve created in order to provide for the sisters in their retirement; and
- ◆ the estimation of future income and expenditure flows for the purpose of assessing going concern.

Assessment of 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.

Assessment of going concern (continued)

The Trustees are in the process of forming a Charitable Incorporated Organisation (CIO) and it is their intention to transfer the assets, liabilities and activities of the English Province of the Union of the Sisters of the Presentation of the Blessed Virgin Mary Charitable Trust to the newly formed CIO on 31 March 2026. As a result, these accounts have been prepared on a basis other than going concern. This does not result in adjustments to the reported figures. The Trustees of the charity have concluded that there are no material uncertainties related to events or conditions that may cast significant doubt on the ability of its successor to continue as a going concern. The Trustees are of the opinion that its successor will have sufficient resources to meet its liabilities as they fall due. With regard to the next accounting period, the year ending 31 March 2026, the most significant areas that affect the carrying value of the assets held by the charity are the level of investment return and the performance of the investment markets (see the investment policy and the risk management sections of the Trustees' report for more information).

Income recognition

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

Income comprises donations and legacies, investment income and interest receivable, charges for care services and other income including the surplus on the disposal of tangible fixed assets.

Donations, including salaries and pensions of individual religious received under Gift Aid or 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.

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.

Income recognition (continued)

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 is recognised once the dividend or similar distribution has been declared and notification has been received of the amount due.

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 from fees and related charges in respect to care services is recognised to the extent that it is probable that the economic benefits will flow to the charity and the revenue can be reliably measured. It is measured at fair value of the consideration received or receivable, excluding discounts and rebates.

Other income is measured at fair value and is recognised in the period in which the charity is entitled to receipt and the amount can be measured with reasonable certainty.

Income from specific grants is accounted for when 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.

The 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.

Expenditure recognition

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. All expenses are allocated to the applicable expenditure headings. The classification between activities is as follows:

Expenditure recognition (continued)

Expenditure on raising funds includes all expenditure associated with raising funds for the charity. This relates to investment management fees only.

Expenditure on charitable activities includes all costs associated with furthering the charitable purposes of the charity through the provision of its charitable activities. Such costs include costs in respect to the support of members of the Congregation; expenditure incurred in the provision of care services to residents at the charity's Care Centre in Matlock, Derbyshire; and charitable grants and donations.

Donations relate, in the main, to the support of the Congregation's own work overseas and the support of other Roman Catholic charitable organisations. Donations are included in the statement of financial activities when approved for payment. Provision is made for donations approved but unpaid at the period end.

All expenditure is stated inclusive of irrecoverable VAT.

Allocation of support and governance costs

Support costs represent indirect charitable expenditure. In order to carry out the primary purposes of the charity it is necessary to provide support in the form of personnel development, financial procedures, provision of office services and equipment and a suitable working environment. The nature of the charity's structure means that support costs applicable to each of the charity's activities can be identified directly and there has been no need for any apportionment between headings.

Governance costs comprise the costs involving the public accountability of the charity (including audit costs) and costs in respect to compliance with regulation and good practice.

Governance costs are apportioned using percentages based on the direct expenditure incurred on the support of members of the Congregation and their ministry and on the provision of care services. No apportionment is made to expenditure on donations and grants or to expenditure on raising funds as the amounts are not deemed material.

Tangible fixed assets

All assets costing more than £1,500 and with an expected useful life exceeding one year are capitalised.

- ◆ Freehold and long leasehold land and buildings
Freehold and long leasehold land and buildings purchased on or prior to 31 March 1996 are included in the accounts at a valuation determined by the Trustees as at that date with professional assistance, based on replacement cost for existing use. As permitted by FRS 102, with effect from 1 July 2014 the value assigned to this property is now deemed its cost. Land and buildings purchased on or after 1 April 1996 are shown on the balance sheet at cost. Freehold land and buildings comprise:

Tangible fixed assets (continued)

- ◇ Non-specialised buildings are those designated as, and used wholly or mainly for, private residential accommodation. Such buildings are not depreciated. Their value and condition are reviewed annually by the Trustees and an impairment provision made where their residual value is materially less than their book value.
- ◇ Specialised buildings comprise the charity's care home and large residential convents. Depreciation is provided at 2% per annum on a straight-line basis to write the buildings off over their estimated useful economic life to the charity.
- ◆ Furniture, plant and equipment and motor vehicles
Expenditure on the purchase and replacement of furniture, plant and equipment and motor vehicles is capitalised and depreciated on a straight-line basis in order to write each asset off over its estimated useful economic life.
 - ◇ Furniture and equipment 5 or 10 years
 - ◇ Motor vehicles 5 years

Fixed asset 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 closing quoted market price.

The charity does not acquire put options, derivatives or other complex financial instruments.

As noted above the main form 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.

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.

Debtors

Debtors are recognised at their settlement amount, less any provision for non-recoverability. Prepayments are valued at the amount prepaid. They have been discounted to the present value of the future cash receipt where such discounting is material.

Cash at bank and in hand

Cash at bank and in hand represents such accounts and instruments that are available on demand or have a maturity of less than three months from the date of acquisition. Deposits for more than three months but less than one year have been disclosed as short term deposits. Cash placed on deposit for more than one year is disclosed as a fixed asset investment.

Creditors and provisions

Creditors and provisions are recognised when there is an obligation at the balance sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably. Creditors and provisions are recognised at the amount the charity anticipates it will pay to settle the debt. They have been discounted to the present value of the future cash payment where such discounting is material.

Foreign currencies

Income received and costs incurred overseas are translated into Sterling at the rate of exchange in force at the year end. This policy does not comply with FRS 102 but has been adopted to avoid over-complexity. The amounts involved are not material.

Exchange differences arising on translation of assets and liabilities at the balance sheet date are recorded as movements on general funds.

Pension contributions

The charity offers its employees membership of a defined contribution pension scheme administered by the National Employment Savings Trust (NEST). Contributions to the scheme are debited to the statement of financial activities in the year in which they are payable to the scheme. The assets of the scheme are held by an independent corporate trustee, whose activities are governed by the National Employment Savings Trust Order 2010, made by the Secretary of State in exercise of powers confirmed under the Pensions Act 2008.

Finance leases

Assets held under finance leases are capitalised and depreciated over their useful lives. The corresponding lease obligation is treated in the balance sheet as a liability. The interest element of rental obligations is charged to the statement of financial activities over the period of the lease at a constant proportion of the outstanding balance of capital repayment.

Operating leases

Rentals under operating leases are charged to the statement of financial activities as the rentals fall due.

Funds structure

Restricted funds comprise monies raised for, or their use restricted to, a specific purpose, or contributions subject to donor imposed conditions.

Funds structure (continued)

The general fund comprises those monies which may be used towards meeting the charitable objectives of the charity and which may be applied at the discretion of the Trustees.

The designated funds are monies or other assets set aside out of general funds and designated for specific purposes by the Trustees.

The tangible fixed assets fund represents the net book value of those tangible fixed assets used for the support of the sisters and their ministry. A decision was made to separate this fund from the general fund in recognition of the fact that the assets are used in the day to day work of the charity, and the fund value would not be realisable easily if needed to meet future contingencies.

Services provided by members of the Congregation

For the purposes of these accounts, no monetary value has been placed on administrative and other services provided by the members of the Congregation.

1 Income from: Donations and legacies

	Un- restricted funds £	Restricted funds £	Total funds 2025 £	Un- restricted funds £	Restricted funds £	Total funds 2024 £
Pensions and salaries of individual religious received under deed of covenant	1,059,959	—	1,059,959	1,056,550	—	1,056,550
General donations and legacies	4,276	63,974	68,250	12,573	65,767	78,340
	1,064,235	63,974	1,128,209	1,069,123	65,767	1,134,890

2 Income from: Investments and interest receivable

	Un- restricted funds £	Restricted funds £	Total funds 2025 £	Un- restricted funds £	Restricted funds £	Total funds 2024 £
Income from listed investments						
. UK fixed interest	40,834	—	40,834	53,110	—	53,110
. UK equities	123,620	—	123,620	146,364	—	146,364
. Overseas equities and alternatives	124,422	—	124,422	122,967	—	122,967
	288,876	—	288,876	322,441	—	322,441
Interest receivable						
. Bank interest	14,116	86	14,202	9,515	81	9,596
. Other interest	2,295	—	2,295	2,296	—	2,296
	16,411	86	16,497	11,811	81	11,892
	305,287	86	305,373	334,252	81	334,333

3 Income from: Surplus on disposal of tangible fixed assets

	Total funds 2025 £	Total funds 2024 £
Surplus on disposal of non-specialised freehold property	371,920	—
Surplus on disposal of motor vehicles	1,431	4,599
	373,351	4,599

4 Expenditure on: Support of members of the Congregation and their ministry

	Un-restricted funds £	Restricted funds £	Total funds 2025 £	Un-restricted funds £	Restricted funds £	Total funds 2024 £
Staff costs (note 9)	252,567	—	252,567	211,973	—	211,973
Premises	386,296	—	386,296	496,054	—	496,054
Sisters' living and ministry expenses	620,359	—	620,359	582,359	—	582,359
Education, training and spiritual renewal	44,496	—	44,496	25,199	—	25,199
Depreciation of buildings	109,136	—	109,136	102,924	—	102,924
Other support costs	137,301	—	137,301	81,210	—	81,210
Governance costs (note 7)	14,445	—	14,445	13,666	—	13,666
	1,564,600	—	1,564,600	1,513,385	—	1,513,385

5 Expenditure on: Provision of care services

	Un-restricted funds £	Restricted funds £	Total funds 2025 £	Un-restricted funds £	Restricted funds £	Total funds 2024 £
Staff costs (note 9)	1,680,603	—	1,680,603	1,590,818	—	1,590,818
Depreciation of buildings	95,490	—	95,490	95,490	—	95,490
Other costs	406,459	1,311	407,770	372,344	537	372,881
Governance costs (note 7)	20,355	—	20,355	18,770	—	18,770
	2,202,907	1,311	2,204,218	2,077,422	537	2,077,959

6 Expenditure on: Grants and donations in support of miscellaneous charitable activities

The charity makes grants and donations, principally in support of the overseas missions of the Congregation and to other causes which further the Roman Catholic faith.

The grants and donations payable during the year were as follows:

	Un-restricted funds £	Restricted funds £	Total funds 2025 £	Un-restricted funds £	Restricted funds £	Total funds 2024 £
. Generalate of the Congregation	77,865	—	77,865	56,699	—	56,699
. Overseas missions of the Congregation	—	52,195	52,195	—	38,805	38,805
. Notre Dame de Sion	2,500	—	2,500	—	—	—
. Church Action on Poverty	2,400	—	2,400	2,400	—	2,400
	82,765	52,195	134,960	59,099	38,805	97,904

7 Governance costs

	Total funds 2025 £	Total funds 2024 £
Legal and professional fees	34,800	32,436

Allocated as follows:

	Total funds 2025 £	Total funds 2024 £
Support of members of the Congregation and their ministry (note 4)	14,445	13,666
Provision of care services (note 5)	20,355	18,770
	34,800	32,436

All governance costs related to unrestricted funds in both 2024 and 2025.

8 Net expenditure before net investment (losses) gains

This is stated after charging:

	Total funds 2025 £	Total funds 2024 £
Staff costs (note 9)	1,933,170	1,802,791
Auditor's remuneration, including VAT		
· Statutory audit services	34,800	32,436
Depreciation	271,992	275,931
Exchange losses	341	377

9 Staff costs, Trustees' remuneration and key management personnel

	2025 £	2024 £
Staff costs during the year were as follows:		
Wages and salaries	1,646,975	1,522,123
Social security costs	132,185	112,629
Pension contributions	28,064	22,711
	1,807,224	1,657,463
Agency staff	125,946	145,328
	1,933,170	1,802,791
Staff costs by function were as follows:		
Support of members of the Congregation and their ministry (note 4)	252,567	211,973
Provision of care services (note 5)	1,680,603	1,590,818
	1,933,170	1,802,791

9 Staff costs, Trustees' remuneration and key management personnel (continued)

One employee earned between £70,000 and £80,000 per annum (including benefits) during the year (2024: One employee earned between £70,000 and £80,000 per annum).

The average number of employees during the year expressed as both full time equivalent (FTE) and average numbers, analysed by function, was:

	2025 FTE	2024 FTE	2025 average	2024 average
Support of members of the Congregation and their ministry	7	8	13	9
Provision of care services	57	55	69	76
	64	63	82	85

As members of the Congregation, the Trustees' living expenses during the year were borne by the charity, but they received no remuneration or reimbursement of expenses in connection with their duties as Trustees during the year.

Key management

The Trustees consider that they comprise the key management of the charity in charge of directing and controlling, running and operating the charity on a day to day basis.

All Trustees are members of the Congregation and whilst their living and personal expenses are borne by the charity they receive no remuneration or reimbursement of expenses in connection with their duties as Trustees or work as key management (2024: £nil).

The Care Centre Manager and the Matron are considered key management personnel of the charity's Care Centre in charge of running and operating the Care Centre under the supervision of the Management Board. The total remuneration for the year (including employer's pension contributions) was £132,066 (2024: £147,416).

10 Taxation

The English Province of the Union of the Sisters of the Presentation of the Blessed Virgin Mary Charitable Trust is a registered charity and, therefore, is not liable to income tax or corporation tax on income derived from its charitable activities, as it falls within the various exemptions available to registered charities.

11 Tangible fixed assets

	Freehold and long leasehold land and buildings		Furniture, plant and equipment £	Motor vehicles £	Total £
	Non- Specialised £	Specialised £			
Cost or valuation					
At 1 April 2024	2,479,555	9,920,715	432,040	246,285	13,078,595
Additions	—	191,364	24,539	17,786	233,689
Disposals	(286,085)	—	(2,952)	(48,586)	(337,623)
At 31 March 2025	<u>2,193,470</u>	<u>10,112,079</u>	<u>453,627</u>	<u>215,485</u>	12,974,661
At deemed cost (1996 valuation)	1,036,278	6,475,476	—	—	7,511,754
At cost	<u>1,157,192</u>	<u>3,636,603</u>	<u>453,627</u>	<u>215,485</u>	5,462,907
	<u>2,193,470</u>	<u>10,112,079</u>	<u>453,627</u>	<u>215,485</u>	12,974,661
Depreciation and impairment					
At 1 April 2024	466,033	3,838,659	297,551	226,045	4,828,288
Depreciation charge for the year	—	204,627	58,751	8,614	271,992
On disposals	—	—	(1,770)	(48,582)	(50,352)
At 31 March 2025	<u>466,033</u>	<u>4,043,286</u>	<u>354,532</u>	<u>186,077</u>	5,049,928
Net book values					
At 31 March 2025	<u>1,727,437</u>	<u>6,068,793</u>	<u>99,095</u>	<u>29,408</u>	7,924,733
At 31 March 2024	<u>2,013,522</u>	<u>6,082,056</u>	<u>134,489</u>	<u>20,240</u>	8,250,307

Included within freehold and long leasehold land and buildings is a property held on a 999 year lease signed on 5 March 1964. The property is included in the accounts at a net book value of £948,600 (2024: £899,750). There were additions of £86,224 to the property in the year (2024: none) and accumulated depreciation was £920,092 (2024: £882,718). The lease provides for the charity to occupy the property at an annual rent of £1 but to take responsibility for all costs relating to the building including repairs, maintenance and insurance. Under the lease the charity covenants to occupy and use the property solely as a Roman Catholic institution for religious and charitable purposes in accordance with its trust deed. At any time, should the charity wish to cease to occupy the premises, the Trustees are to give the lessor six months' notice in writing and, on surrender of the lease, the lessor is required to pay to the charity an amount equal to the value of the lease term surrendered, such value to be determined between the two parties.

As permitted under FRS 102, the charity has opted to adopt a policy of not revaluing its tangible fixed assets. The book value of the land and buildings owned at 1 April 1996 is based on Trustees' valuation made, with professional assistance, as at that date on the basis of replacement cost for existing use. As permitted by FRS 102, with effect from 1 April 2014 the value assigned to this property is now deemed its cost. Additions in subsequent years are stated at cost. Other tangible fixed assets are stated at cost.

The historical cost of the freehold land and buildings included above at a valuation cannot be obtained without significant time and expense researching past records. The Trustees are of the opinion that such information would not add to the understanding of the accounts.

11 Tangible fixed assets (continued)

It is likely that the open market values of certain of the charity's land and buildings are materially greater than their book values. The amount of such differences cannot be ascertained without incurring significant costs, which, in the opinion of Trustees, is not justified in terms of the benefit to the users of the accounts.

Capital commitments

At 31 March 2025, the charity had no capital commitments (2024: £nil.)

12 Investments

	2025 £	2024 £
Listed investments		
Market value at 1 April 2025	12,823,839	13,201,102
Additions	1,548,212	773,765
Disposals at book value (proceeds: £1,263,298; losses: £69,169)	(1,332,467)	(1,754,672)
Net unrealised investment (losses) gains	(360,206)	603,644
Market value at 31 March 2025	<u>12,679,378</u>	<u>12,823,839</u>
Cash held by investment managers for re-investment	133,281	481,961
	<u>12,812,659</u>	<u>13,305,800</u>
Historical cost of listed investments at 31 March 2025	<u>8,587,396</u>	<u>8,137,364</u>

Listed investments held at 31 March 2025 comprised the following:

	2025 £	2024 £
UK fixed interest	1,835,793	1,671,924
UK equities	3,174,324	3,652,651
Overseas equities	6,293,759	6,233,103
Alternatives	1,375,502	1,266,161
	<u>12,679,378</u>	<u>12,823,839</u>

All listed investments were dealt in on a recognised stock exchange.

At 31 March 2025 the following listed investments were deemed material when compared to the overall portfolio valuation as at that date.

Holding	Investment	Market Value at 31 March 2025	Market Value at 31 March 2024
5,000	Findlay Park Funds ICAV	£837,459	£864,516

13 Debtors

	2025 £	2024 £
Care charges receivable	171,457	134,783
Loan (see below)	129,312	127,017
Investment income receivable	3,629	12,618
Prepayments and accrued income	24,875	4,774
	329,273	279,192

The loan represents an amount advanced to a former member of the Congregation to facilitate the purchase of a property. The loan, which is secured by way of a first legal charge over the property, is repayable on the sale of the property or the death of the former member. The former member died on 7 May 2025. On repayment the loan attracts interest of 3% per annum calculated from the date it was advanced to the date of repayment. The accrued interest to 31 March 2025 of £52,796 (2024: £50,501) has been added to the loan.

	2025 £	2024 £
Loan amount	76,516	76,516
Accrued interest	52,796	50,501
	129,312	127,017

14 Creditors: amounts falling due within one year

	2025 £	2024 £
Amounts payable in respect to capital works	22,679	12,650
Expense creditors	54,980	39,133
Amount due to the Generalate of the Congregation (including grant payable of £20,000 (see note 15))	78,088	76,699
Taxation and social security costs	23,979	25,117
Other creditors	11,886	7,254
Deferred grants	678	3,092
Accruals	57,522	53,258
	249,812	217,203

15 Creditors: amounts falling due after more than one year

	2025 £	2024 £
Amounts due to the Generalate of the Congregation	60,000	80,000

In 2019 the charity committed to make a ten year grant of £200,000 in aggregate to the Generalate of the Congregation towards the cost of a building project to develop the Western Apex of Nano Nagle, Cork, Ireland. £20,000 is payable per annum.

16 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trusts to be applied for specific purposes:

	At 1 April 2024 £	Income £	Expenditure £	At 31 March 2025 £
Overseas missions fund	71,563	62,564	(52,195)	81,932
Care Centre residents' fund	2,036	1,496	(1,311)	2,221
	73,599	64,060	(53,506)	84,153

	At 1 April 2023 £	Income £	Expenditure £	At 31 March 2024 £
Overseas missions fund	46,817	63,551	(38,805)	71,563
Care Centre residents' fund	276	2,297	(537)	2,036
	47,093	65,848	(39,342)	73,599

Funds held at 31 March 2025 to be applied as follows:

The overseas missions fund

The overseas missions fund represents monies received for the purposes of supporting overseas missions of the Congregation.

The Care Centre residents' fund

The Care Centre residents' fund represents donations to be applied for the benefit of all residents of the Care Centre and used to pay for entertainment and other items to be decided on after consultation with the residents.

17 Tangible fixed assets fund

	2025 £
At 1 April 2024	8,250,307
Net movement in year	(325,574)
At 31 March 2025	7,924,733

	2024 £
At 1 April 2023	7,740,810
Net movement in year	509,497
At 31 March 2024	8,250,307

The tangible fixed assets fund represents the net book value of the charity's tangible fixed assets. A decision was made to separate this fund from the general fund and other designated funds of the charity in recognition of the fact that the tangible fixed assets are essential to the day-to-day work of the charity and as such their value should not be regarded as funds that would be realisable with ease, in order to meet future contingencies.

18 Designated funds

The income funds of the charity include the following designated funds, which have been set aside out of unrestricted funds by the Trustees for specific purposes:

	At 1 April 2024 £	New designations £	Released £	At 31 March 2025 £
Retirement reserve	12,000,000	—	—	12,000,000

	At 1 April 2023 £	New designations £	Released £	At 31 March 2024 £
<i>Retirement reserve</i>	<i>12,000,000</i>	<i>—</i>	<i>—</i>	<i>12,000,000</i>

Retirement reserve

The retirement reserve consists of monies which the Trustees have set aside in order to provide for the sisters in their retirement. The value of the fund has been calculated using actuarial principles but is adjusted as necessary for additional care costs and changes in the number of the Province's members and their age profile.

19 Analysis of net assets between funds

	General funds £	Tangible fixed assets funds £	Designated funds £	Restricted funds £	Total funds £
Fund balances at 31 March 2025 are represented by:					
Tangible fixed assets	—	7,924,733	—	—	7,924,733
Investments	812,659	—	12,000,000	—	12,812,659
Net current assets	827,796	—	—	84,153	911,949
Long term liabilities	(60,000)	—	—	—	(60,000)
Total net assets	1,580,455	7,924,733	12,000,000	84,153	21,589,341

	General funds £	Tangible fixed assets funds £	Designated funds £	Restricted funds £	Total funds £
<i>Fund balances at 31 March 2024 are represented by:</i>					
<i>Tangible fixed assets</i>	<i>—</i>	<i>8,250,307</i>	<i>—</i>	<i>—</i>	<i>8,250,307</i>
<i>Investments</i>	<i>1,305,800</i>	<i>—</i>	<i>12,000,000</i>	<i>—</i>	<i>13,305,800</i>
<i>Net current assets</i>	<i>614,741</i>	<i>—</i>	<i>—</i>	<i>73,599</i>	<i>688,340</i>
<i>Long term liabilities</i>	<i>(80,000)</i>	<i>—</i>	<i>—</i>	<i>—</i>	<i>(80,000)</i>
<i>Total net assets</i>	<i>1,840,541</i>	<i>8,250,307</i>	<i>12,000,000</i>	<i>73,599</i>	<i>22,164,447</i>

19 Analysis of net assets between funds (continued)

The total unrealised gains as at 31 March 2025 constitutes movements on revaluation and are as follows:

	2025 £	2024 £
Total unrealised gains at 31 March 2025 on investments	4,091,982	4,686,475
Reconciliation of movements in unrealised gains		
Unrealised gains at 1 April 2024	4,686,475	4,074,165
Net (losses) gains in respect to disposals of listed investments in the year	(234,287)	8,666
Net (losses) gains arising on revaluation of listed investments arising in the year	(360,206)	603,644
Total unrealised gains at 31 March 2025	4,091,982	4,686,475

20 Commitments under operating leases

At 31 March 2025, the charity had future minimum commitments under non-cancellable operating leases as follows:

Equipment	2025 £	2024 £
Payments falling due:		
. Within one year	6,283	6,283
. Between two and five years	18,211	24,494
. After five years	—	—
	24,494	30,777

21 Related party transactions and transactions with Trustees

As members of the charity, none of the Trustees have resources of their own as all earnings, pensions and other income have been donated to the charity under a Gift Aid compliant Deed of Covenant. During the year, the total amount donated by the Trustees to the charity was £101,747 (2024: £91,934).

Details of other transactions with Trustees are given in note 9 to these accounts.

There were no other related party transactions in the year.

22 Ultimate control

The charity, which is constituted as a trust, was controlled throughout the period by The English Province of the Union of the Sisters of the Presentation of the Blessed Virgin Mary by virtue of the fact that the Provincial Leader of the Congregation appoints the Trustees.