

Archdiocese of Birmingham

Ethnic Chaplaincies, Eparchies and Missions

Invitation to Day with Archbishop Bernard Longley

Friday 22 November 2024

Time: 10:45 am-3:45 pm

Dupuis Centre, St. Paul's Convent

Notes of the meeting

10.45

Welcome and Introductions

Information on financial requirements for Charities and religious organisations in the UK

Introduction and Discussion, *Mgr Daniel McHugh*

1. Opening and Welcome

- The meeting commenced with an opening prayer led by Mgr Daniel McHugh.
- Mgr Daniel welcomed Archbishop Bernard Longley and all attendees.
- Everyone introduced themselves to facilitate a sense of community among participants.

2. Introduction to Financial Guidelines

Mgr Daniel introduced the topic of financial requirements for chaplaincies in the UK. The discussion addressed the need for more transparent and standardised financial practices across religious organisations. Essential points covered included:

- **Importance of Transparency:** Mgr Daniel emphasised the importance of being transparent in all financial dealings. Maintaining thorough records and transparency were essential principles for properly managing chaplaincy funds.
- **Current Variations in Financial Practices:** It was noted that the financial handling varies significantly from one chaplaincy to another. This inconsistency has led to challenges in managing funds effectively across the archdiocese.
- **Need for Standardised Financial Requirements: A call was made to establish** standardised financial requirements for chaplaincies. This would help ensure that all religious organisations follow similar practices, making fund management more efficient and transparent.

3. Handling Donations and Collections

Mgr Daniel raised the issue of how donations and collections are handled across different chaplaincies:

- **Role of Priests in Collections:** It was noted that priests in individual chaplaincy are responsible for taking collections, but how the money is handled differs across chaplaincies. There is no universal method for managing these funds, which causes inconsistencies.
- **Lack of a Rigid Rule:** There is no “hard and fast rule” regarding how donations should be handled, but the need for clear guidelines was acknowledged.
- **Proposed Financial Guidelines:** Mgr Daniel presented a set of proposed financial guidelines to all attendees. These guidelines addressed the issues raised, particularly the lack of uniformity in handling donations and collections. (#Document1)

4. Discussion: Raising Funds and Ensuring Financial Sustainability

Attendees raised several points of concern during the discussion:

- **How to Raise Funds?:** Participants inquired about the best ways to raise money for chaplaincy. Effective fundraising strategies were a key concern.
- **Financial Sustainability of Chaplaincies:** Attendees also questioned how chaplaincies can ensure they have enough funds to maintain operations, particularly in light of varying income streams.
- **Use of Funds for Daily Expenses:** There were questions about whether funds raised could be used for daily operating expenses or if they had to be reserved for specific projects.
- **Ensuring Transparency in Financial Practices:** A critical question was how to ensure proper financial transparency and avoid potential misuse of funds.

5. Mgr Daniel’s Recommendation

Mgr Daniel responded to the concerns raised by participants with the following recommendations:

- **Open Dedicated Accounts for Specific Purposes:** Mgr Daniel suggested that chaplaincies open separate accounts for specific purposes. For instance, one account could be designated for the stipends of Hong Kong priests. This would allow for more transparent management and better tracking of these funds.
- To maintain a clear record of the offerings using the Ethnic Chaplaincies Cash Count Form. (#Document 2)

6. Floor Discussion: Issues with Fund Management

Some concerns were raised from the floor:

- **Challenges in Managing Money from Multiple Sources:** Participants expressed difficulty managing funds from multiple sources. One issue raised was that individual donations could not be used directly by the chaplaincy, as they need to be funnelled through the Archdiocese's broader financial umbrella.
- **Difficulty Opening Bank Accounts:** There was also concern about the challenges of opening separate bank accounts, mainly due to stringent banking regulations.

7. Archbishop Bernard's Input

Archbishop Bernard Longley provided valuable input to clarify some of the issues raised:

- **Chaplaincies as Quasi-Parishes:** Archbishop Bernard emphasised that chaplaincies should establish their own separate accounts for financial transactions, as they are considered quasi-parishes within the Archdiocese. This structure would allow chaplaincy to manage their funds independently while adhering to the Archdiocese's guidelines.
- **Standardized Mechanism for Chaplaincy Organisations:** He also stressed that any organisations that are part of a chaplaincy should follow the financial mechanisms in place for parishes. This would help ensure consistency and proper oversight in managing financial resources.

8. Key Takeaways:

- The importance of standardising financial practices for chaplaincies was emphasised throughout the meeting.
- Transparency in financial dealings was identified as critical, especially concerning donations and collections.
- The need for chaplaincies to open dedicated accounts for specific purposes was highlighted as a way to improve financial management and ensure accountability.
- Further discussion will be needed to address the practical challenges, including difficulties opening bank accounts and managing funds from multiple sources.

11.45

Personal Finance and Reporting to Inland Revenue, Ms. Luyan Yin, FOTAS (Four Oaks Taxation and Accounting Services)

1. Opening and Introduction

The meeting began with a brief introduction by Mgr Daniel McHugh. He welcomed Ms. Luyan Yin, the speaker from FOTAS, who would be discussing personal finance and reporting to the Inland Revenue. Mgr Daniel outlined the importance of understanding tax implications for religious workers and those in ministry roles.

2. Presentation by Ms Luyan Yin: Personal Finance and Tax Reporting

Ms. Yin provided a detailed overview of the tax implications for ministers of religion, particularly in the UK. She explained the importance of registering for self-assessment and National Insurance contributions. The main points discussed were as follows:

- **Reporting Income Over £1,000:** Ms. Yin emphasised that any income over £1,000 should be reported to the Inland Revenue. This is crucial for ensuring proper tax reporting and compliance with UK tax laws.
- **Registration for Self-Assessment and National Insurance Contributions:** She pointed out that ministers of religion, like other self-employed individuals, must register for self-assessment and contribute to National Insurance. This ensures that they are correctly taxed and eligible for benefits, such as pensions.
- **HM Revenue Forms Provided (#Documents 3 & 4)**

Ms. Yin handed out two forms: **HM Revenue & Customs Form HCMC 12/23** (entitled "*Self-Assessment Tax Return for Ministers of Religion*") along with accompanying notes on how to fill it in, and **HM Revenue & Customs Form 02/13** (which pertains to "*National Insurance Contributions for Self-Employed sole-trader*"). These forms are essential for correctly reporting income and ensuring compliance with the tax authorities. The notes provided detailed instructions to help individuals complete the forms accurately, guiding them through the process of reporting income and making necessary contributions to National Insurance.

3. Discussion and Questions from the Floor

Income from Poland – Double Taxation Issues

- One participant raised a question about income received from Poland, expressing concerns about double taxation. Ms Yin clarified that income earned in the UK must be reported to the Inland Revenue. Still, income earned overseas (before coming to the UK) does not need to be reported unless specific conditions apply, such as if the income is brought into the UK.

Income from NHS and Donations to the Parish

- One participant explained that while working for the NHS, their income was given to the parish, and in turn, this money was considered their income. Ms. Yin clarified that if the income is paid directly into the chaplaincy's account, it should not be treated as the individual's income for tax purposes. In this case, the priest would not be liable for income tax on those funds, as they are considered parish income. However, if the priest personally receives and controls the money, it should be reported as personal income and taxed accordingly.

Religious Congregations and Personal Belongings

- Archbishop Bernard clarified that religious congregations, where members do not own personal belongings, do not need to report personal income or assets to the tax authorities.

Self-Employed Individuals and Income Tax

- A participant raised concerns about self-employed individuals and the tax implications of money given to the parish. Ms. Yin confirmed that if an individual is self-employed, they must pay income tax on their earnings. If money is donated to the parish, the parish is responsible for managing the funds, and the priest would not be liable for income tax on those funds, as they are considered parish income.

Concerns about Potential Loopholes

- Concerns were raised that all monies must be included in the priest's income, and the system might allow for potential loopholes. Ms. Yin advised caution and suggested that the tax return process be handled carefully to ensure all income is accounted for properly.

Importance of Clear Expense Records

- Ms. Yin emphasised that all expenses must be recorded for tax return purposes. Proper documentation will help avoid errors in tax filing and ensure that claims for tax relief or deductions are valid.

4. Closing Remarks

Mgr Daniel thanked Ms. Yin for her detailed presentation and insights. He emphasised the importance of following the guidelines outlined by Ms Yin to avoid any legal or financial issues, especially for chaplains and religious ministers. This agenda concluded with the understanding that further assistance would be available from FOTAS if individuals needed help with their tax returns.

12.30 **Midday Prayer in the Chapel of Selly Park Convent**

12.50 **Lunch**

14.00 **Why the Jubilee is Good News for our World, Paul Northam, Diocesan Coordinator for the Jubilee 2025 (#Document 5)**

1. Paul Northam, from the Archdiocese of Birmingham's Office for Mission, introduced the theme for the upcoming Jubilee Year 2025. He emphasised that the Jubilee is "Good News for our World," not just for the Church, and aims to spread hope to Christians and all people. His work supports parishes in evangelisation, discipleship, marriage, and family life, helping people grow in faith.

2. Using the metaphor of a garden, Paul compared the role of Ethnic Chaplaincies to tending to the growth of people's faith, guiding them to maturity. He then explored the concept of the Jubilee Year, which will begin in December 2024. This year is rooted in the Jewish tradition of the Jubilee, where land, property, and debt are restored, and people are freed. It's a time of social and spiritual renewal, inviting everyone into a season of restoration.

3. The Jubilee Year is revolutionary, echoing Jesus' own proclamation in the Gospel of Luke, where He announces the "year of the Lord's favour," bringing good news to the poor and liberty to captives. This message calls for societal justice, forgiveness, and spiritual renewal. Throughout history, the Church has celebrated Jubilee Years, with the next one beginning on December 24, 2024, and lasting until January 6, 2026.

4. The theme for the Jubilee Year 2025 is "Pilgrims of Hope," focusing on pilgrimage, hope, and accompanying others on their faith journey. Pilgrims will be encouraged to walk on ancient and modern routes, experiencing spiritual renewal. Pilgrimages will be organised within the diocese, offering opportunities for indulgence and deeper participation.

5. Ethnic chaplains are vital in spreading the Jubilee message, particularly in reconciliation, justice, and joyfully serving God. The Jubilee year's key concepts include living as pilgrims of hope, sharing the hope of Christ, and celebrating joy, which should extend beyond the Church to the broader community.

6. The diocese will provide resources for the Jubilee, including prayer cards, booklets, and digital materials. Chaplains are encouraged to creatively engage people of all ages and backgrounds in celebrating the Jubilee. In conclusion, the focus of the Jubilee is on joy, hope, and inviting the wider community to share in the message of hope and renewal.

Priestly Vocations and Ethnic Communities – Introduction to the Project Programme for the Jubilee Year 2025, Fr Fretch Ballesteros SDV, followed by an exchange of experience (#Document 6)

Fr. Fretch Ballesteros SDV introduced the new **Project Programme for Priestly Vocations** to support ethnic communities in the discernment of vocations to the priesthood. The programme is part of the more significant Jubilee Year 2025 celebrations. It seeks to address the specific needs of ethnic communities in the Church, encouraging and supporting those called to priestly ministry.

Fr. Ballesteros explained that ethnic chaplaincies and communities play a crucial role in the **vocation discernment process**, offering a space where young men from diverse backgrounds can explore their calling in the context of their cultural heritage. He emphasised the importance of encouraging **intercultural dialogue** and **mutual support** within the Church as a way of nurturing vocations in a multicultural context.

Exchange of Experience:

An open exchange of experiences followed, where participants shared their thoughts and ideas on fostering priestly vocations within ethnic communities. Several individuals spoke about the importance of **personal relationships** and **mentorship** in helping young men from ethnic backgrounds discern their call to the priesthood. They shared that having role models and mentors who understand their cultural background can significantly impact the discernment process.

Details of the 10th May 2025 Intercultural Mass:

Fr. Ballesteros then outlined plans for the **10th May 2025 Intercultural Mass**, which will occur at **St. Brigid's Church**, not at St. Mary's Oscott as initially planned. The Mass will celebrate the diversity and unity within the Church, bringing together people from various cultural backgrounds to honour their shared faith and the vocation to the priesthood.

- At the end of the **Intercultural Mass**, a **young priest** and a **young student** from diverse cultural backgrounds will share their personal experiences, reflecting on their journeys of faith and vocation.
- The event aims to highlight how ethnic communities contribute to the universal Church and to inspire others to consider a vocation to the priesthood within the context of their own cultures.

Fr. Ballesteros emphasised that this Mass would be a key event for Jubilee Year 2025, promoting **intercultural understanding** and fostering a sense of belonging and inclusion within the Archdiocese.

Enquirers Day at St. Mary's Oscott – Summer 2025:

In addition to the Intercultural Mass, Fr. Ballesteros introduced the **Enquirers Day**, which will be held at **St. Mary's Oscott** in the summer of 2025. This event will allow young men discerning a vocation to the priesthood to learn

more about the process and meet others on a similar journey. Fr Fretch, Mgr Daniel, Fr Craig, and others will discuss the programme.

Fr. Ballesteros noted that this event is open to individuals from all cultural backgrounds. The **Enquirers Day** will be significant for ethnic communities, as it will help them understand how their cultural identity can enhance their vocation to the priesthood.

Family Visits to Oscott:

Fr. Ballesteros also mentioned that **family visits** to Oscott can be arranged for those considering a vocation to the priesthood. These visits will allow families to see the seminary, meet the seminarians, and learn more about the formation process. This initiative is precious for ethnic communities, where family support and involvement play an essential role in vocation discernment. These visits will be arranged with the Rector, Canon Michael.

Mgr. Daniel's Remarks:

Mgr. Daniel raised an important point regarding the timing of the **Intercultural Mass on 10th May 2025**. He reminded the group that the **Walsingham pilgrimage** for the Archdiocese is also scheduled for the same date. This overlap of events may require coordination and planning, ensuring that those attending the pilgrimage know the significance of the Intercultural Mass and can participate in both events.

Closing Remarks:

Fr. Ballesteros concluded the meeting by encouraging participants to promote vocations within ethnic communities, emphasising the need for collaboration and **mutual support** in the discernment process. He also encouraged everyone to share the information about the **10th May 2025 Intercultural Mass** and **Enquirers Day**, as they are vital opportunities for young people to explore their calling.

Action Points:

1. **Coordinate logistics for the Intercultural Mass on 10th May 2025** at St. Brigid's Church.
2. **Promote the Enquirers Day** at St. Mary's Oscott in the Summer of 2025 to young men discerning priestly vocations.
3. **Arrange family visits to Oscott** to help support vocational discernment within ethnic communities.
4. **Coordinate the Walsingham pilgrimage** with the Intercultural Mass on the same date to ensure participation.

Address by Archbishop Bernard Longley Followed by discussion

Archbishop Bernard Longley began his address by expressing his gratitude for the fruitful discussions held earlier in the meeting. He emphasised the importance of listening to one another and engaging in open, free discussions grounded in the Archdiocese's vision. Archbishop Longley highlighted that the Church is a **geographically and ethnically diverse local community** and that collaboration, sharing resources, and working closely together are essential to efficiently fulfilling the Church's mission.

He thanked everyone for their participation, noting that these discussions, which began with a focus on finances, are integral in supporting the work of the Church and reaching out to communities. Archbishop Longley reflected on his own journey, marking the **21st anniversary** of his ordination as an auxiliary bishop in Westminster. He underscored the importance of **sharing and supporting one another** in the ministry, particularly in chaplaincies, which, while relatively new, represent the diversity of cultures and languages that are a rich gift from the Holy Spirit.

He also acknowledged life's challenges, particularly for those who face restrictions in freely practising their faith, urging everyone to remember those suffering.

Archbishop Longley reminded the group that **every chaplaincy** must have **bank accounts** to manage finances and that transparency is critical to maintaining trust and accountability. He concluded his address by thanking **Paul** for his presentation and mentioning the importance of localities in organising pilgrimage events for the Jubilee Year.

Finally, Archbishop Longley emphasised the significance of the **Jubilee Icon** in the upcoming celebrations.

Discussion Following the Archbishop's Address:

- **Paul (Jubilee Icon and Symbolism)**
 - Paul spoke about the **Jubilee Icon**, describing it as a symbol of hope for the Year.
 - He explained that the **rainbow** in the icon represents hope and renewal, which is especially important given the Church's current challenges.
- **Input on Hope and Vocations**
 - highlighted the importance of **hope** and the ongoing challenges of fewer priests and vocational difficulties.
 - many people from different cultures are being called to serve, and engaging with them, understanding their circumstances, and encouraging them to pursue vocations is essential.

- **Archbishop Bernard Longley's Response**
 - Archbishop Longley affirmed that the **Jubilee Year** offers an opportunity to unite people, mainly from diverse cultures, to reflect on shared values and the hope the Jubilee brings.
 - He acknowledged the diverse needs of chaplaincies and asked Paul for feedback on what additional support would be helpful for the various chaplaincies.
- **Polish Father's Vocational Concerns**
 - The Polish Father discussed the challenge of promoting vocations within the Polish community. He noted that many young people are turning away from the priesthood for various personal reasons and emphasised the importance of fostering a supportive culture for vocations early on.
- **Input on Young Families**
 - **Young families** should be encouraged to promote vocations and help young people discern a calling to the priesthood or religious life.
- **Suggestion on Integration**
 - Father Solomon proposed better integration of ethnic communities into **local parishes**. This would help strengthen communities and foster a more inclusive Church environment that supports vocations.
- **Archbishop Bernard Longley's Remarks on Cultural Integration and Ministry**
 - The Archbishop supported Father Solomon's suggestion and shared that **35 priests** and **55 deacons** had been ordained in the past years, which is encouraging for the Archdiocese.
 - He called for continued prayers for vocations.
 - Archbishop Longley spoke about his conversations with the **Deanery Pastoral Council** and the **Council of Priests**, which are instrumental in promoting vocations and strengthening ministry across the Archdiocese.
- **Archbishop Bernard Longley's Final Thoughts on Collaboration**
 - Archbishop Longley concluded by appointing **Father George** to liaise with **Mgr. Daniel** on matters related to the **Holy Year** and sharing celebration plans.
 - He expressed interest in the **Pilgrimage to Rome** and encouraged participants to share details about such events with others.
- **Paul's Request for Event Information**
 - Paul asked for information about upcoming pilgrimages or events so that he could help distribute this information to ensure a broad audience.
- **Archbishop Bernard Longley on Sharing Information**
 - Archbishop Longley shared that a **pilgrimage for permanent deacons** is being planned. He asked Paul to ensure this information is included in event listings and websites for broader visibility.

- He also recommended **translating materials** related to the Jubilee Year into different languages to make them accessible to all communities within the Archdiocese.
- **Archbishop Bernard Longley’s Emphasis on Vocation Promotion**
 - Archbishop Longley highlighted that **Paul** should continue collaborating with the **Vocation Office** to promote **Marriage, Family, and Vocations**.
 - He encouraged each ethnic chaplaincy to send their **vocation-related ideas** and initiatives to the Vocation Office to ensure all communities are involved in promoting vocations.
 - The Archbishop reminded the group that the **discerning weekends** at **St. Mary’s Oscott** are an essential opportunity for individuals considering priestly vocations.

Mgr. Daniel’s Closing Remarks:

- Mgr. Daniel concluded the meeting by addressing the issue of **safeguarding** and providing an “Ethnic Chaplaincies Representative Nomination” form (**#Document 7**).
- The meeting closed at 1545 with a **closing prayer**.

