



## Annual Report and Accounts 2023

Registered charity number: 1008155

## Just two of the students we have supported during the year...



*"Good day, I wish to write to you to inform you that I successfully managed to clear my exams for my three years at Levy Mwanawansa Medical University. And I am glad and overjoyed to also inform you that I am graduating on the 21st of this month (September) with a diploma clinical medical general (cog).*

*Let me take this opportunity to thank you (Zambia Society Trust) for the opportunity you gave me to grant of K8,000 towards my school fees at a time when I needed it the most. The grant has really helped me to be where I am today and I believe you are still out there helping out the less privileged like you did for me. Please keep up the good work. Once again allow me to say thank."*

**Kasaka Mbundu**

*"My name is Namakau Mukela, a second year student at Livingstone College of nursing and midwifery pursuing a Diploma in Registered Nursing. I was very happy and humbled when I received an email from you informing me that I am one of the students awarded grants under the Zambia Society Trust.*

*This academic year has been very interesting and I keep acquiring new knowledge all thanks to you who made sure I am still in school because you paid my tuition fees. This year I was attached to the various departments at Livingstone Teaching Hospital such as the psychiatric ward, maternity ward, surgery ward, medical ward, main Intensive care unit, theater, Eye clinic, and many others in order for me to learn and perfect my skills as nursing is a hands-on career.*

*I did not find any challenges this year at school and I managed to pass my exams at first attempt. I promise to continue working hard in both practical and theory so that I will complete my program."*



## **Our new Patron...**

We are delighted that Siphon Phiri has agreed to become a Patron of The Zambia Society Trust.

Siphon is based in Lusaka. He gained extensive experience in banking and corporate finance at senior level before moving into multiple entrepreneurial activities including the development of large infrastructure projects e.g. a 180 MW run of river hydroelectric power station on the Zambezi River in Western Province, a 25 MW grid solar PV project in Sesheke, and a 200 MW wind project in Katete, Eastern Province.

Together with his brother Guy he formed the DARP Foundation to promote education and sports for underprivileged Zambians. He chairs the Chewa Development Trust and is Vice Chair Emeritus on the American School Board. He has served on Zambia's Human Rights Commission focusing on minority rights. Siphon has been an active local supporter of the Zambia Society Trust for many years and was closely involved in establishing the Lusaka based Zambian Society Trust which has given us a strong local presence.



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## Follow Us



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The Zambia Society Trust



[www.zambiasocietytrust.org.uk](http://www.zambiasocietytrust.org.uk)

*Front Cover: The Zambia Trust volunteer, Mwate Nampemba, leading a training session at Kwasha Mukwenu*

## Message from our Chairman

It has been a great joy and privilege to chair the Zambia Society Trust ('the Trust') for the past twelve years, and as I step down I am delighted that, subject to election by members, Tim Legge will be taking over at this year's AGM on 18th November. Tim has a great love of Zambia and regularly visits the projects. He is also expanding the of local volunteer supporters - which means that we now have a strong team living locally who keep in close touch with the projects, and who also provide practical help, encouragement and support. They are all very much valued.

I am also delighted that Siphon Phiri has agreed to become a Patron of the Trust. Siphon's help in setting up the Zambia Society Trust ('ZnST') and local bank account was invaluable, and his active interest and practical support locally is very much appreciated. I would also like to thank Charity Siwela who helped to establish ZnST and has acted as a very efficient company secretary from the outset. I am sure that having a strong local presence will be a key part of the Trust's future in the years ahead.

It is always a joy to hear from the projects that we are privileged to support in Zambia and that are described in this report. All of the project leaders are selflessly committed and dedicated to the children and young people that they serve, and whose lives are transformed as a result. Our financial support for these projects is only possible because of the regular subscriptions of our members, plus fundraising activities, bequests and generous donations from individuals. A heartfelt thanks to you all.

Thanks also to all of my fellow trustees, who are unwavering in their commitment and who undertake the many practical activities with great enthusiasm. Sadly, Roger Thompson died on 22nd May and his contribution to the Trust over many years is very much missed. He was a passionate coordinator of the footballs and netballs project and David Nicholls has kindly agreed to take this over. Roger and his wife Sheila were also editors of the much loved, monthly "News from Zambia". Anne Fraenkel has kindly agreed to take over temporarily, alongside producing 'ZST News'. After many years of faithful service, Eileen Hamilton has handed over the role of Membership Secretary to Jenny Healy who has agreed to incorporate this with her role as Secretary. Huge thanks are due to Andrew Rose for putting together this Annual Report and for carrying out the role of Treasurer with such wholehearted commitment.

I am very pleased to welcome John Hunter as a trustee of the Trust. John worked as a telecommunications engineer in Zambia in 1969 and returned in 1994 as a telecoms consultant.

We value very highly the longstanding, friendly relationship that we have with the Zambia High Commission, and look forward to this continuing with High Commissioner Her Excellency Macenje Mazoka, Deputy High Commissioner Mrs Lubu Nxumalo and the High Commission staff. We are very grateful for their generous hospitality in allowing us to host meetings at Palace Gate.

**John Barnard**

## Trustees' Annual Report

The Trustees of The Zambia Society Trust ("the Trust") present their annual report and accounts of the charity for the year ended 30 June 2023. The accounts have been prepared in accordance with the accounting policies set out in Note 1 to the accounts.

In setting our objectives and planning our activities the Trustees have considered the Charity Commission's guidance on public benefit. The Trust is devoted to the relief of poverty, disability and sickness, and to the promotion of good health and advancement of education. In allocating funds in line with the Trust's Objects, the Trustees make a considered assessment of the benefits to the specific beneficiaries and to Zambian society as a whole. The Trust monitors on an on-going basis all projects to which it gives support.

### Education Grants: £25,500

Without the hard work of our volunteers in Zambia the selection process would be very difficult, and a great deal of thanks must go to them, especially Whiteson Chenge. The number of students wishing for support to finish their courses continues to rise and for this current year we have received a record number of applicants and have been able to sponsor more students than ever. The UK Education Committee still tries to prioritize students whose courses, we believe, will have the most impact on the future of Zambia. We also try to ensure that female applicants receive as much support as male applicants. In addition to the funding of the Education programme from our members and supporters we were delighted to receive a grant from the Business Council of Africa. This grant enabled the Trust to support 6 Students whose courses are business related. We thank the Business Council of Africa for their contribution to our Education programme.

Below are the names, gender, ages and courses of students we were able to sponsor for 2023 for one year:

Chimuka Moonga	M	22	Information Technology
Baywel Chimbweta	M	21	Diploma in Clinical Medicine
Carol Kayumba	F	25	B.Sc. Development Studies
Charity Ngulube	F	25	Midwifery
Chitupa Mwale	F	29	Agriculture, Marketing & Development
Patrick Mapulani	M	22	Diploma in Clinical Medicine
Mwila Mapipo	F	25	Biomedical Sciences
Odrick Siankilimba	M	21	Animal Science Major
Mukuka Mutale	F	23	B.Sc. Transport & Logistics
Comelius Lamba	M	24	Computer Science
Kent Siabbwalo	F	24	Registered Nursing
Mapalo Chewe	F	20	B.Sc. Engineering Agriculture
Frank Moonde.	M	23	B.A. Accountancy
Towela Chingwe	F	25	B.Sc. Human Biology

Swence Nakamba	F	23	Diploma in Marketing
Terence Shalimo	M	26	Public Health Nursing
Mpanjilwe Simbeye	M	25	Diploma in Agricultural Education
Priscar Munkombwe	F	21	B.A. Business Studies
Namakau Mukela	F	26	Registered Nursing
Mutale Kafebe	F	19	Veterinary Medicine
Kasamba Mweene	F	24	B.A. Science in Human Biology
Jean Kapilya	F	22	B.A. Law
Chongo Mulengo	M	26	B.A. Theology

In 2023 we were also able to support the following 23 students for a second year to enable them to complete their courses:

Paul Kazumba	M	25	B.Sc. Mathematics
Ruth Swala	F	21	Registered Nursing Public Health
Sarah Nkonde	F	22	Registered Nursing Midwifery
Thankxo Muleya	M	34	Advance Certificate in Electrical Engineering
Mukaso Katemba	M	24	Diploma in Biomedical Engineering
Musenge Bwalyai	M	28	B.A in Education, Physics & Mathematics
Nancy Chulu	F	23	Registered Nursing Midwifery
Noria Mautsa	F	20	B.Sc. Banking and Finance
Kingswell Mavuka	M	24	B.A. Medicine and Surgery
Leroy Phiri	M	28	Business Administration
Manase Mkandawire	M	24	B.A. Arts and Education
Melisa Kanyungo	F	21	B.Sc. Nursing
Moses Mambwe	M	25	Actuarial Science
Tasha Mashillipa	M	23	Human Resources Management
Angela Malitati	F	21	B.A. Business Studies with Education
Belita Chitambo	F	24	B.A. Pharmacy
Isaac Munkombwe	M	28	Public Health Nursing
Gerald Macha	M	25	B.A. Medicine Sciences
Memory Nkhata	F	24	Registered Nursing
Nora Shamboka	F	23	B.A. Medicine and Surgery
Rose Mfunne	F	20	Diploma in Registered Nursing
Rhoda Muwowo	F	23	Diploma in Teaching, Education & Sciences
Lydia Banda	F	24	B.A. Science in Biology

## Help for Orphans and Other Vulnerable Children

### **Kwasha Mukwenu (Help Your Neighbour), Matero, Lusaka: £3,000**

The school for needy children continues to offer classes for 140 pupils from Grade 1 to Grade 9 with four teachers. Funds are also provided to cover examination fees and to progress further in Government Schools.

With the funding provided by the Trust two extra classrooms have been built and are now in use, along with 10 new desks for Grade 7 children. Work has also been undertaken to improve the school environment which has included cutting back of grass and improving drainage.

There are now over 180 children attending classes. In addition, the new nurse school is also thriving with an increase in the numbers of children attending. The school is led by the Headmaster, Christopher Lwele, with the support of one qualified teacher and two unqualified teachers.

Kwasha Mukwenu still faces a number of challenges which are due to the increased number of children attending school and further demand for school places. These challenges include a shortage of desks and learning material. A further issue is the school is understaffed due to a shortage of qualified teachers.



*Left: Tim Legge and the Kwasha Mukwenu Committee. Right: Bernard Lusale & Mwate Nampemba with Headmaster, Christopher Lwele*

The Trust is one of Kwasha Mukwenu's major donors. In addition to providing grant funding the Trust provides advice and support to the leadership team and Headmaster. This support is provided by two of the Trust's local volunteers and by Tim Legge. Tim is a regular visitor to all of our projects and has visited Kwasha Mukwenu twice during the year.



## **Mpunde Mission Centre, Central Province: £3,000**

Mpunde Mission operate a school in Mpunde, which is situated in a remote area to the West of Kabwe, and also helps fund local children to attend other schools and colleges in the area. The Mission is led by Fr Adam.

Tim Legge visited the Mpunde Mission in October 2022 and April of this year. On both occasions Tim experienced Fr Adam's kind hospitality by staying overnight in his presbytery. During the April visit Tim enjoyed meeting four of the students: two attend secondary school and two are student nurses. All four young people impressed as able and enthusiastic students and expressed their thanks to the Trust for the support we provide.

Fr Adam has also written to the Trust:

*"People in our area are experiencing a lack of food. The rainy season this year was short and irregular therefore the harvest was very poor. I admire Zambians for happiness and optimism they maintain despite such a difficult situation. This optimistic attitude helps them not to fall into depression and despair. I try to learn from them this approach to life and problems, even though my troubles are incomparably much smaller than hunger.*

*I would like to express our appreciation and thank you most sincerely for your bighearted donation in the amount of K64,416.30. The entire donation was used to pay the school fees for seventeen children from poor families. Six of them study in colleges. Ephraim Njovu has graduated from Nkrumah University this year. I hope that he will be able to find a good job and continue his studies to improve his qualifications. The other three boys and two girls continue their studies at nursing colleges. Mumba Sokontwe and Andrew Kalunga (Left to Right in photo below) have started their third and final of studies. The remaining eleven supported teenagers attend secondary school. All the supported children and youths really appreciate the Trust's help and chance for education and better life. They know that their parents who struggle to feed them are not even able to think about their education.*



*My words will never be appropriate to thank you for your care and help. You have been helping our children for so many years giving them hope for prosperous future. I humbly beg you to continue funding our students and school children”.*

### **Chitsime Association, St Lawrence, Home of Hope, Lusaka: £4,000**

The Home of Hope, alongside St Lawrence Church, Misisi, provides accommodation, teaching and emotional support to boys who are rescued from living on the streets. The project is run by Brother Jacek Rakowski, and he goes to great lengths to find the families of these boys and to help them reunite and reintegrate. In his latest report to us Brother Jacek writes

*“I am delighted to bring you a short update on our endeavours at the St. Lawrence Home of Hope. It has been a year of shared triumphs, compassion, and unwavering support for the most vulnerable children in Lusaka*

#### *A Shelter of Renewal*

*Nestled in the heart of Lusaka, Home of Hope remains a beacon of hope for young boys in dire need. Their journeys have often been fraught with adversity, but with enduring friendship of The Zambia Society Trust we see these young hearts emerge stronger and more hopeful.*



#### *A Year of Growth and Resilience*

*The past year was defined by an unwavering commitment to our mission. We began with 116 children under our care and opened our doors to 83 new boys. Amid this numerical growth, we witnessed the joy of reintegration with families – 77 children reunited with their loved ones. It’s not just statistics; it’s a testament to lives rebuilt and futures reignited.*

*Today, we cherish 91 young souls. Among them, 15 are thriving in boarding schools, while the rest find warmth and care within Home of Hope's nurturing embrace. This progress signifies not only numbers but the restoration of dreams and rebirth of hopes.*

#### *A Milestone of Unity*

*In our 25<sup>th</sup> year, we unveiled a symbol of progress – a brand new dining hall. This milestone was made possible through the collective effort of friends and donors, including the generous support of the Trust. It now stands as a tangible testament to our shared vision.*

#### *Confronting Challenges with Resilience*

*Our path was not without challenges. The rising cost of fuel and the maintenance of ageing vehicles made travel a daunting task. Simultaneously, the cost of mealie-meal, a dietary staple, soared. These challenges only strengthened our resolve and deepened our compassion.*

#### *Overcoming Overcrowding*

*Officially, Home of Hope provides space for 55 beds, yet we are consistently embrace more than 80 children. It's a testament to the trust these young hearts place in us and the compelling need for our services. Among them, 50 are now engaged in various schools around Lusaka, their destinies transformed through education. An additional 41 receive their education within Home of Hope, under the exceptional guidance of our dedicated teacher, Mrs Sandra.*

#### *The Zambia Society Trust's Gift of Hope*

*The Trust's financial support transcends mere numbers; it represents a story of transformation, story whispered among the corridors, celebrated among children as a beacon of hope. It is the Trust's generosity that imparts security, care and the promise of brighter tomorrows to these young souls."*

### **St Francis Hospital, Katete AIDS Orphans Project: £3,000**

The St Francis Hospital, Katete AIDS Orphans Project ('the Project') began in the early 1990s following the onset of HIV/AIDs. There were an increasing number of children who were being left without parents or any relations whatsoever.

Following Emelia Mulenga's premature death in May 2023 Cynthia Nyendwa was appointed to run the Project. Cynthia Nyendwa has a diploma in teaching and has worked with children in the Lusaka area for the last three years. She has taken on the mantle of being the hospital focal point person. During the 10 months that Emelia was running the programme, the number of young people under the Project increased from just over 700 to 1,055. Providing funding allows the hope is this number will be increased to approximately 1,500.



The Project's experience has shown that a Western-style orphanage does not work in the rural areas and that it is far more practical to try to keep the children in the villages in which they grew up. Where there is no relative, guardians are appointed for the children. Where appropriate, the Project will pay the school fees and also provide them with the requisites to attend school. Cynthia Nyendwa visits each village three times a year to ensure that not only are school-age children attending school, but also to ensure that they are happy. Often families' biological children may be treated better than other children that are being looked after through the Project.

On occasion, it might be appropriate that a child should attend boarding school. In the interest of fairness, the Project will pay up to a certain amount of the boarding school fees. For young people who graduate from grade 12 with excellent results and wish to do medicine or nursing, sponsors can be found to support them individually. The Project currently has seven nurses in training at Saint Francis Hospital (Registered Nursing or Midwifery or both) as well as two reading medicine at the University of Zambia.

### **Shingwa School, Mpongwe**

#### **Progress on the three-classroom block project**



Four years ago, parents and teachers at Shinwa school started a project to build a three-classroom block to upgraded the school from a primary school to a high school. This was to ensure that that pupils were able to continue with their education up to high school since there are no high schools in the area for children to go to after primary education. The construction was started but stalled soon after the foundations were built due to lack of funds.

Money has been raised by students from University of Central Lancashire and Lancaster University through the Trust as well as by Philippa Karg, an 18 years old daughter of a local farmer in Zambia near Shingwa school. Funds raised to-date, amounting to £7,500, are being used to build the classroom block up to roof level.



Philippa's remarkable 900km bike challenge from Shingwa school to the source of the Zambezi River.

The school is applying to Beit Trust (UK charity) for a grant to complete the 3-classroom block.

Money donated by a church in UK earlier this year has been used to build one teacher's house and renovate some old teachers houses at school in order to improve teachers living conditions.

## **APTERS (Appropriate Paper Technology) Group: £2,000**

APTERS produces mobility aids with recycled paper and cardboard to assist physically challenged children while empowering physically challenged adults.

The grant from the Trust continues to enable the APTERS Support Group to fund mobility aids for the 80% of children of vulnerable and single parents who are unable to pay for these themselves. Early in 2023 Karen Jellis became its chair. She trained as an occupational therapist to people with disabilities and children with special needs and first worked in Zambia in 2008. She moved there permanently in 2010. Now retired she is keen to explore different ways to increase APTERS' funds and hopes to get corporate sponsorship. She has already helped to get their vehicle fully operational once more and back on the road. This is a great relief because it means the team can get out to help more children.

Lucie Kasanga, another great supporter of Kenneth Habaalu and his team, visited the UK in Spring 2023 bringing a selection of items made by APTERS to be sold to raise funds. The flat-packed giraffes, pencil pots and jewellery items are sold at craft fairs in Zambia. They were a sell out at the Salisbury lunch in June. If a means could be found of bringing more to the UK a ready market could certainly be found.

During his recent visit to Zambia, Tim Legge, visited APTERS. Among those he met were Kenneth, the manager, Darius his assistant manager and Karen. He said it was great to feel the commitment and enthusiasm of staff and volunteers and looks forward to continuing the Trust's commitment to supporting APTERS.

### **Pilgrim - Salt in the Community (Growing Communities): £6,500**

“Pilgrim - Salt in the Community” was established in 2012 by Grace and Justin Sholoma in order to create a “Resource Village” to bring practical help and encouragement to people living in very small, widely dispersed settlements in an impoverished area in Kalilanama, Serenje District. “Growing Communities - Zambia” is a UK charity which raises funds to support the project.

Chief Kabamba kindly allocated a large parcel of land for the project, and he continues to be an active supporter. A great deal has been accomplished - the Pilgrim resource village now comprises:

- A thriving school, with 150 children from Pre-Grade to Grade 6 and three teachers. Currently there are two classrooms and the older children have their lessons in the office. A new classroom for Pre-Grade children is nearing completion. All children receive a nutritious mid-day meal, with locally grown food, and the little ones have regular health checks. An additional bore hole has been sunk to serve the school. Priorities for the future are to build better housing for teachers, accommodation for weekly boarding for the many children who walk a very long distance to get to the school, and an additional classroom for the older children. There is an active parent teachers group and an adult literacy class for parents.
- A Health Post. This is currently staffed by a volunteer nurse and local people, trained and supervised by Grace who is a registered nurse. Discussions are being held with the local health authority to take it to the next level and have a Government employed health worker.
- An active church meets in the school building, with regular pastoral visits to villagers in the surrounding area.
- Agricultural activity has expanded to include various field crops, a large vegetable garden and livestock, including pigs, chickens and fish farming.



Left: Pre-grade school getting started. Right: Children gathering before school

In a recent progress report Grace said *“We are seeing light at the end of the tunnel. We are so thankful for your kindness and support which has touched hundreds of children and vulnerable people in the community. Children have received education, some at a late stage in their lives but better late than never. People, especially young children, are no longer dying of malaria because*

*they are able to attend the Health Post for treatment. Community members are slowly changing their lifestyles - some have formed agricultural cooperatives, others have formed village banking groups and youths have formed football and netball teams. Some families have built brick houses with iron sheet roofs which is a big achievement.”*

We are particularly delighted to see people from the local area coming together as a thriving community and taking active roles in the project, including participating in the leadership team.

**Football and Netballs: £2,000**

Roger Thompson who was responsible for the Footballs and Netballs project for many years sadly died in 2023. Roger was passionate about this initiative.

The Trust continues to have a good working relationship with the Zambia Open Community Schools (‘ZOCS’). The Director, Petronella Sibeene, sends us regular reports on the distribution of balls with the emphasis on rural areas in the more remote parts of the country.



*Mawanda Church Netball Team with a netball provided by The Zambia Society Trust*

ZOCS has a central office in Lusaka and in June we received their 2022 Annual Report, including their financial statement. This is detailed and comprehensive.

The balls are manufactured by Alive and Kicking. This organisation has manufacturing facilities in Lusaka and also in Kenya and Ghana. They have a Head Office in London, and the funds are sent to the London office who then transfer the money directly to Alive and Kicking in Lusaka. The funds provided ZOCS with 106 footballs and netballs (one football and one netball for each school). The balls are hard wearing and suitable for hard surfaces. The balls are kept for special occasions, such as cup matches.

This project works well because of the co-operation with ZOCS, and Alive and Kicking.

ZOCS was established in Zambia in 1992 to empower communities to provide quality basic education to 259,691 (127,232 girls and 132,459 boys) Orphans and Vulnerable Children ('OVC') in 1,385 Community Schools in 97 Districts in the 10 provinces of Zambia, based on the principle that every child has a "right to education". ZOCS works with a number of partners including Alive & Kicking.

This is an extract from a recent ZOCS Report:

*"Working with Alive & Kicking*

*Over the years, Alive & Kicking has donated footballs and netballs to Community Schools through ZOCS. This gesture has seen thousands of learners enjoy attending school where apart from learning, they enjoy playing football or netball.*

*This year, ZOCS received 106 Balls from Alive & Kicking. Working with Area Members of Parliament, these balls were distributed in Community Schools in Mongu, Sesheke, Itezhi-tezhi, and Lusaka districts. The Area Members of Parliament learnt about ZOCS/Alive & Kicking support from schools that benefitted last year and confessed the balls attracted children to be in school.*

*The Members of Parliament supported the distribution exercise during their quarterly Constituency Monitoring Visits. The visits allowed the Honourable Members to establish the status of the Community Schools (and other schools) as well as monitor construction of classes supported through the Constituency Development Fund (CDF).*

*For ZOCS, footballs and netballs are considered helpful for learners for the following reasons;*

- 1. Enhance collaborative abilities, self-confidence and social skills in children in Community Schools and the youths in communities (youths use school grounds for sports)*
- 2. Encourage children to broaden their talents since understanding the principles of one sport makes it simpler to learn the regulations of another.*
- 3. Early physical education at school teaches the concept of collaboration whereas being part of the team provides vulnerable children with the feeling of identity.*
- 4. Playing football and netball excites learners to attend school regularly.*



*ZOCS appreciates the unwavering support from its partners. This support in form of footballs and netballs hugely contribute towards promoting education and development in the lives of the OVC."*

**David Nicholls**

## **Administration**

### ***Members***

We continue to attract new members but due to an increasing number of older members who are no longer with us the overall number of subscribing members has declined to less than three hundred.

The ability to join and pay via our website has greatly eased the process of becoming a member of the Trust. In the long term this should enable membership numbers to increase.

We are very grateful to those who add extra funds to their annual subscription or have made generous additional donations during the year.

Some of our older members still receive copies of our newsletters by post. Although this is understandable, it does, due to the increasing costs of printing and postage mean that less of an individual's subscription is available for our charitable work.

Eileen Hamilton is standing down as the Trust's membership secretary after fifteen years in the post. Jenny Healy will be taking on this responsibility from November 2023.

### ***Publications: Newsletters***

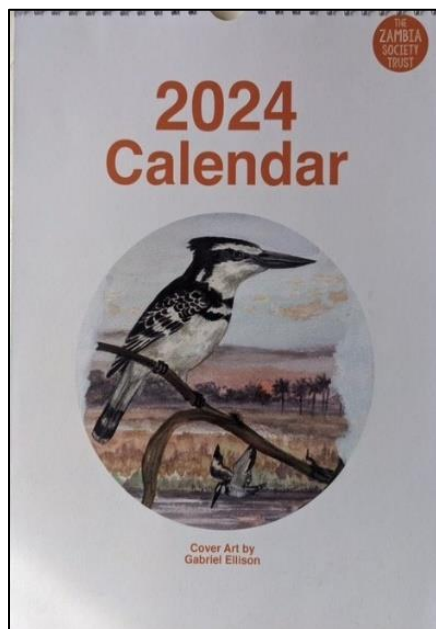
We keep in touch with members and other supporters with regular emails, on average about once a month. These include illustrated reports on the projects the Trust supports in Zambia, as well as news of fundraising and other events and activities, both those organised formally by the Trust and those undertaken by enthusiastic supporters. There are currently just over 500 subscribers to these emails. Anyone with an interest in the Zambia Society Trust can sign up to receive email news via our website <https://zambiasocietytrust.org.uk/newsletters> - they don't have to be a member. For the very small number of members who do not have email, a special printed edition of *ZST News* was sent out by post in July containing recent project updates. The Annual Report will provide additional updates for these members.

In addition, for members only, we have since 1978 produced a monthly round-up of news from the Zambian press called *News from Zambia*. For the past seven years this was very ably edited by Roger Thompson with additional support from his wife, Sheila. Very sadly, Roger died suddenly in May and since then the task has reverted to the previous editor, Anne Fraenkel, who is acting until a permanent replacement can be found. The majority of members receive *News from*

Zambia by email but we continue to send a print version to a small number of members without email.

## **Fundraising**

We are, as always, grateful to all our members and friends who continue to donate and support the Trust.



We have had two opportunities this year to sell merchandise. Our cards, prints and mugs sold both at the 2022 Annual General Meeting and the Zambia Reunion Lunch in Salisbury which contributed to funds. Margaret Rose's Cafe Morning in Cumbria last November also raised money for the Trust.

We had a runner in the London Marathon whose sponsorship raised money for us.

The 2024 calendar will soon be available to purchase through our website at a cost of £12 including postage.

Remember that purchasing almost anything online - goods or services - can be done via Easyfundraising or AmazonSmile. A small percentage of your purchase will go to the Trust so long as you nominate it as your charity of choice.

We hope that the year ahead will generate some novel fundraising initiatives - any ideas will be gratefully received.

## **Finance**

The financial result for the Trust shows an overall income of £56,766 (2022: £66,338) and, after deducting administrative expenses of £5,349 (2022: £4,755) and charitable expenditure of £49,167 (2022: £67,140), a net surplus of income over expenditure of £2,250 (2022: deficit of £5,557).

## **Donations**

Donations are made to the Trust for a variety of reasons and sources which range from monthly donations, proceeds from a fund-raising event, in memory of a loved one or in recognition of a significant birthday milestone.

Donors can request that their donation be allocated to a specific designated project such as the Footballs and Netballs project. Otherwise, donations will be allocated to the General Fund and utilised as determined by the trustees. During the year General, Designated and Restricted donations of £27,240, £1,118 and £5,610 respectively were received.

The generous support of all our donors is greatly appreciated. Many of whom are long standing supporters of the Trust.

### ***Cash Reserves***

The Trust's cash reserves at 30<sup>th</sup> June each year determine how much in total can be awarded in grant and education funding in the subsequent year. At 30<sup>th</sup> June 2023 cash reserves were £49,294 which will enable the Trust to maintain its charitable funding at current level of expenditure.

### ***Management and administration expenditure***

Management and administration expenditure of £5,349 represents 64% of our membership subscription income. This sum includes the entrance fee for the London Marathon, the calendar printing and postage expense of £960, and the *News From Zambia* printing and postage expense of £1,842. In light of the high level of inflation within the UK economy the Trust has reviewed its non-charitable expenditure to ensure all such expenditure is under control and cost effective. As a result of this review the Trust's *News From Zambia* will cease to be made available in printed hardcopy form from March 2024. The cost of printing and posting *News From Zambia* to a small number of members is sadly too high to justify its continuation.

As the Trust is able to fund its management and administration expenditure out of membership subscription income all donation income received is expended entirely on its charitable projects.

During the year none of the trustees received any remuneration or other benefits from the Trust.

### ***Risk Assessment***

The Trust reviewed its risk policy during the year and no changes were required.

In summary, the Trust finished the year in a strong financial position enabling its current level of charitable funding to be maintained in the year ending 30<sup>th</sup> June 2024.

## The Zambia Society Trust

### Income and Expenditure account for the year ended 30 June 2023

	Notes	Unrestricted Funds £	Designated Funds £	Restricted Funds £	Total 2023 £	Total 2022 £
<b>Incoming Resources</b>						
Subscriptions		8,353			8,353	9,091
Donations - General Funds		27,240			27,240	14,635
ZST Merchandise		3,198			3,198	4,252
Contributions to Meetings		884			884	-
Inland Revenue Tax Refunds		7,809			7,809	5,713
<b>Investment Funds &amp; Deposits</b>						
Income from Investments				2,035	2,035	2,443
Interest on COIF Deposit Account		519			519	50
<b>Specific Donations</b>						
Joy Goodacre Fund				240	240	270
Education Fund				5,370	5,370	2,621
Football & Netballs Fund				-	-	-
Orphan Fund				-	-	7,025
Growing Communities				-	-	15,500
Shingwa School			1,118		1,118	4,738
<b>Total Incoming Resources</b>		<b>48,003</b>	<b>1,118</b>	<b>7,645</b>	<b>56,766</b>	<b>66,338</b>
<b>Resources Expended</b>						
<i>Charitable Expenditure</i>						
Grants to Individuals	4			25,500	25,500	30,000
Grants to Orphan Projects	5 & 6		13,000		13,000	21,000
Grant to APTERS	5	2,000			2,000	2,000
Grant to Growing Communities	5		6,500		6,500	9,000
Grants to Shingwa School	5				-	3,000
Football & Netballs Fund	5		2,000		2,000	2,000
Bank charges		167			167	140
<i>Management &amp; Administration</i>						
Sundry expenses		861			861	621
ZST Merchandise		960			960	1,597
Newsletters & Annual Report		2,080			2,080	1,555
Website and IT support		1,004			1,004	982
London Marathon fee		444			444	-
<b>Total Resources Expended</b>		<b>7,516</b>	<b>21,500</b>	<b>25,500</b>	<b>54,516</b>	<b>71,895</b>
Net Incoming/ (Outgoing) Resources		40,487	(20,382)	(17,855)	2,250	(5,557)
Fund balances brought forward at 1 July 2022		34,483	9,263	83,216	126,962	144,603
(Decrease)/increase in investment unit values				(136)	(136)	(12,084)
Transfers from Unrestricted Funds		(31,662)	13,975	17,687	-	-
<b>Fund Balance as at 30 June 2023</b>		<b>43,308</b>	<b>2,856</b>	<b>82,912</b>	<b>129,076</b>	<b>126,962</b>

## The Zambia Society Trust

### Balance Sheet as at 30 June 2023

		2023	2022
	Notes	£	£
Cash at bank			
NatWest Current Account		33,887	19,190
COIF Deposit Funds	7	<u>15,407</u>	<u>27,853</u>
		<b><u>49,294</u></b>	<b><u>47,043</u></b>
Investments			
Ridge Hobson Fund	8	44,270	44,346
Joy Goodacre Fund	8	13,536	13,559
Education Fund	8	<u>21,976</u>	<u>22,014</u>
		<b><u>79,782</u></b>	<b><u>79,919</u></b>
<b>Net current assets</b>		<b><u>129,076</u></b>	<b><u>126,962</u></b>
Represented by:			
Restricted Funds			
Ridge Hobson Fund	8	45,399	45,701
Joy Goodacre Fund	8	14,976	14,828
Education Fund	8	<u>22,537</u>	<u>22,687</u>
		<b><u>82,912</u></b>	<b><u>83,216</u></b>
Designated Funds			
Football and Netballs Fund		-	-
Growing Communities		-	6,500
Shingwa School		2,856	1,738
Orphans Fund		<u>-</u>	<u>1,025</u>
		<b><u>2,856</u></b>	<b><u>9,263</u></b>
Unrestricted Funds		43,308	34,483
<b>Total Funds</b>		<b><u>129,076</u></b>	<b><u>126,962</u></b>

The Accounts were approved by the Trustees on 18th November 2023

**John Barnard**  
Chairman

**Andrew Rose**  
Treasurer

## The Zambia Society Trust

### Notes to the accounts for the year ended 30 June 2023

#### 1. BASIS OF PREPARATION

The Accounts have been prepared on a receipts and expenditure basis in accordance with the Charities Act 2011 and the Charities (Accounts and Reports) Regulations 2008.

#### 2. FUND ACCOUNTING

##### Unrestricted Funds

Funds which can be used at the discretion of the Trustees in furtherance of the Objects of the Trust.

##### Designated Funds

Funds which are set aside for specific purposes and include donations to appeals for projects.

##### Restricted Funds

Funds which have been donated for specific purposes and are held in charity investment and deposit funds. The income raised thereby is used for the award of grants and bursaries.

#### 3. RESERVES POLICY

Unrestricted and Designated Funds raised in the financial year ended 30 June are allocated, at the discretion of the Trustees, to various projects in accordance with the Objects of the Trust and distributed in immediate subsequent financial years.

#### 4. INDIVIDUAL GRANTS: EDUCATION FUND

	2023	2022
Funds transferred to Zambia	£25,500	£30,000
Balance retained in Zambia as at 30 June	K96,692	K59,625

#### 5. GRANTS TO PROJECTS

	2023	2022
	£	£
<i>Grants to Orphan Projects</i>		
St Francis, Katete	3,000	3,000
St Lawrence, Home of Hope	4,000	4,000
Mpunde Mission	3,000	3,000
Kwasha Mukwenu	3,000	11,000
	<u>13,000</u>	<u>21,000</u>
<i>Footballs &amp; Netballs Fund</i>		
Footballs & Netballs purchased	2,000	2,000
<i>Other Grants</i>		
APTERS	2,000	2,000
Growing Communities	6,500	9,000
Shingwa School	-	3,000
	<u>23,500</u>	<u>37,000</u>
Bank charges	167	140
	<u>23,667</u>	<u>37,140</u>

## The Zambia Society Trust

### Notes to the accounts for the year ended 30 June 2023

#### 6. GRANT TO KWASHA MUKWENU

	2023	2022
Funds transferred to Zambia	£3,000	£11,000
Balance retained in Zambia as at 30 June	Nil	K67,540

#### 7. COIF DEPOSIT FUND

	2023 £	2022 £
Represented by:		
Restricted Funds		
Education Fund	561	673
Joy Goodacre Fund	1,440	1,269
Ridge Hobson Fund	1,129	1,355
Designated Funds		
Footballs and Netballs Fund	-	-
Growing Communities	-	6,500
Shingwa School	2,856	1,738
Orphans Fund	-	1,025
Unrestricted General Fund	9,421	15,293
	<u>15,407</u>	<u>27,853</u>

#### 8. RESTRICTED FUNDS

	Unit Quantity	Unit price £	Unit value £	Deposits £	Total 2023 £	Total 2022 £
Ridge Hobson Fund	37,648.01	1.1759	44,270	1,129	45,399	45,701
Joy Goodacre Fund	11,511.01	1.1759	13,536	1,440	14,976	14,828
Education Fund	18,688.87	1.1759	21,976	561	22,537	22,687
			<u>79,782</u>	<u>3,130</u>	<u>82,912</u>	<u>83,216</u>

## **INDEPENDENT EXAMINERS REPORT TO MEMBERS OF THE ZAMBIA SOCIETY TRUST**

I report on the accounts of The Zambia Society Trust for the year ended 30 June 2023, which are set out on pages 16 to 19.

### **Respective responsibilities of Trustees and examiner**

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

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

### **Independent examiner’s statement**

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

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

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

Silvernos Chinganga MSc ACMA CGMA  
23 Park Meadow Avenue  
Bilston  
West Midlands  
WV14 6HA

18<sup>th</sup> November 2023



## **About Us**

The Zambia Society Trust is a UK-based charity devoted to the relief of poverty, disability and sickness, the promotion of good health and the advancement of education in Zambia. Run entirely by volunteers, the Trust has been working for 50 years to improve the lives and prospects of as many people in Zambia as possible, with a particular focus on children and young people. The Trust does not employ any staff. The Officers and Committee members are all volunteers.

## **Patrons**

Sipho Phiri  
Geoffrey de Mornay Davies

## **Officers**

Chairman: John Barnard  
Vice Chairman: Ken Hamilton  
Treasurer: Andrew Rose  
Secretary: Jenny Healy

## **Trustees**

Peter Fleming (resigned 19<sup>th</sup> November 2022)  
Anne Fraenkel  
Eileen Hamilton  
Gretta Hudson  
Tim Legge  
Mathias Mbewe  
David Nicholls  
Val Pearson (resigned 19<sup>th</sup> November 2022)  
Roger Thompson (passed away 22<sup>nd</sup> May 2023)  
Susan Walker  
Elisabeth Young,  
and the Officers of the Trust.

## **Bankers**

NatWest PLC  
25 High Street  
Colchester  
CO1 1DG

## **Independent Examiner**

Silvernos Chinganga MSc ACMA CGMA