



MAKING AN IMPACT FOR TOMORROW'S ZAMBIA



Annual Report and Accounts 2019



MAKING AN IMPACT.....

MPUNDE MISSION CENTRE

We are a long-term supporter of the Mpunde Mission Centre. Since 2009 we have provided annual grants totalling £23,000 in support of their work with vulnerable children.

In March 2019 our annual grant of £3,000 was spent as follows.....

| | Children | £ |
|-------------------------------|----------|--------------|
| School Fees | | |
| Grades 5 to 9 | 8 | 551 |
| Grade 10 | 5 | 413 |
| Grade 11 | 6 | 624 |
| Grade 12 | 4 | 321 |
| CBU University Ndola | 1 | 157 |
| Total | 24 | 2,066 |
| School uniforms | 42 | 189 |
| Scientific calculators | 10 | 139 |
| School bags | 10 | 194 |
| Hard cover books | 10 | 65 |
| Pillows | 50 | 71 |
| Blankets | 45 | 255 |
| Bank charges | | 21 |
| Grand Total | | 3,000 |



Since 2009 we have provided a total of £158,000 in annual grants to a range of projects, such as Mpunde Mission, to support them in their work with orphan and other vulnerable children



MAKING AN IMPACT.....

EDUCATION GRANTS

Since 2001 we have provided grants to cover tuition and examination fees to enable disadvantaged Zambian students to pursue educational, technical, and vocational courses within Zambia.

260 grants awarded since 2001

A record 30 students being supported in 2018/ 2019

£120,000 of grants awarded since 2009

“With your help I completed my course in environmental health and was later employed in the Ministry of Health. I was posted to Mansa where I am based now, being the first one in the family to graduate with a diploma and to be employed this helped me to put three of my young brothers through school. Today am pleased to tell you that two of them graduated with diplomas in civil and water engineering.

Your assistance helped me improve mine and the lives of my family. I will forever be most grateful to you for the chance you gave me.

Now I have managed to secure a study leave and hope to further my studies to a degree in Environmental health starting June this year. Thank you”

“This is to let you know that have finally completed my 2 years Zambia Enrolled Nursing programme that I was pursuing from June 2015 up to June 2017 at Macha Nursing Training School in Choma District, Southern Province, Zambia.

I am so pleased and delighted therefore to inform you that I am now a full registered member of the General Nursing Council of Zambia.

I am so grateful to Zambia Society Trust and may God bless all the ZST team members.”

Chairman's Report

I would like to welcome all those who are able to attend our fifty first AGM, at the Zambia High Commission, and give a very big thanks to every member for your continued support, which enables us to fund the various projects described in this report.

The Trustees are very grateful for the very close and supportive relationship that we have with the High Commission, and for the warm hospitality that we receive from the High Commissioner, His Excellency Mr. Muyeba Chikonde. We also thank the Deputy High Commissioner, Mrs. Patricia Chanda, for her help and support throughout the year.



As we press on into our sixth decade, I am pleased to report that over the past year we have been able to maintain the level of funding for the projects, every one of which makes a huge impact on the lives of needy children and young people through the provision of vital education and health care. Every year we need to add to the funds from annual subscriptions by additional fundraising. Over the past year this has included another very successful golf day in Harrogate; sales of cards and merchandise; talks by members on Zambia and other topics; a sponsored six day trek by Patrick Hudson in the Ruwenzori Mountains; donations from members; donations from book sales by authors describing their Zambian experiences; donations from charitable organizations; legacies from wills. For all these we give grateful thanks. Every penny raised in these ways goes directly to help needy young people in Zambia.

I am thankful for the enthusiasm and commitment of the Committee members, who ensure that we are able to make wise decisions and who keep in close contact with the local leaders of every project that we support. In this way we can be sure that all of the funding is used appropriately.

One of our long serving committee members, David Powell, is stepping down next year. David has chaired the education sub-committee for many years, and has overseen the growth and huge success of this valuable part of our work. We are very sorry to lose him and will miss his insightful contributions. I am delighted that Ken Hamilton will be taking over the chairmanship of this committee. Our Zambian coordinator for the education project, Sara van Wyk, is also stepping down. Sara has done a magnificent job in managing the education grants in Zambia and we are very grateful to her for all the effort that she has put in. Happily, Whiteson Chenge has agreed to serve as the new Zambian coordinator. Whiteson has been involved with The Zambia Society Trust for many years and is ideally suited to this role.

I am very pleased that Mrs. Susan Walker has agreed to become a Trustee. Susan is the daughter of Dick Hobson who was instrumental in setting up The Zambia Society. Sadly, last year we lost one of our patrons, Derek Ingram. Derek was a distinguished journalist and knew Zambia well.

The topic for our afternoon session this year is the need for new sources of renewable energy in rural Zambia. The low level of water in hydro reservoirs has seriously reduced the power available on the grid, and there is a huge environmental cost from charcoal burning in rural areas. Happily, there are some positive responses to this need which we will be discussing at the meeting.

John Barnard

The Trustees of The Zambia Society Trust (“the Trust”) present their annual report and accounts of the charity for the year ended 30 June 2019. 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: £17,000 (including £2,000 donation from Sir Ernest Cassel Educational Trust, £3,150 from the Brighton & Hove Soiree Rotary Club, and £2,500 for the Business Council for Africa)

Information on the Education Grant Scheme

Annually the Trust assists a small number of disadvantaged Zambian students to pursue educational, technical, and vocational courses in Zambia at approved institutions. Successful completion of their secondary education at Grade 12 is mandatory: courses of six months, one or two years or longer are considered and if students are following longer courses then grants are awarded for the final two years only. These partial grants awarded will usually cover tuition and examination fees.



Grants are paid directly to the approved Zambian institution operating the course and the number of grants awarded depends on available funds.

A short-list of applicants is selected by a Zambia based Education Advisory Group which takes into account the student’s academic record and personal circumstances, issues of gender, disability, location and the value, cost and length of the course. The final selection is then made by the UK based Education committee.

Application Forms are available between March and August each year and successful students are notified in November. Forms may be downloaded from the Trust’s website.

Students apply from all areas of Zambia. The courses cover a wide range of disciplines at universities, colleges, institutions and trades training institutes and include courses in

aeronautical engineering, mass communications, primary, secondary and special education teaching diplomas, nursing and midwifery, radiography, agribusiness management, law, business administration, water engineering, and counselling.

Thirty Grants Awarded

Ten grants for students supported in 2018 and continuing their studies and graduating in 2019.

- Mwansa Mercy: Diploma in Mechanical Engineering at Northern Technical College, Ndola
- Lambwe Jacqueline: Diploma in Clinical Medicine at Chainama College of Health Sciences, Lusaka
- Chama Alice: Diploma in Clinical Medicine Psychiatry at Chainama College of Health Sciences, Lusaka
- Phiri Martha: Zambia Registered Nurse at St Francis School of Nursing & Midwifery, Katete
- Nzala Nora: Diploma in Clinical Medicine at Dovecote College of Health Science, Lusaka
- Kalenga Andrew: Diploma in Surveying at Copperbelt University, Kitwe
- Siambamba Open: Diploma in Agriculture (Crop Science) at NRDC, Lusaka
- Meckson Ilunga: Advanced Certificate in Heavy Equipment Repair at North Technical College, Ndola
- Mulope Lawrence: Bachelor of Medicine & Surgery at UNZA School of Medicine, Lusaka
- Mazimba Donald: Diploma in Clinical Medicine at Chainama College of Health Sciences, Lusaka

Twenty new grants awarded for 2019

- Chisense Natasha: Bachelor of Business Administration, Cavendish University, Lusaka
- Konkola Margaret: Diploma in Food Production Management, at Zambia Institute for Tourism & Hospitality, Lusaka
- Machaliwa Aaron: Bachelor of Art in Economics at UNZA, Lusaka
- Ngwira Stella: Diploma in Water Engineering, NRDC, Lusaka
- Phiri Elizabeth: BSc in Education with Maths & Physics, DMI St Eugene University, Chipata
- Mulenga Mary: Secondary Teachers Diploma, Mufulira Professional College, Mufulira
- Gondwe Peter: Diploma in Early Childhood Education. UNZA, Solwezi
- Musole Justine: Diploma in General Agriculture, Zambia College of Agriculture, Monze
- Mwansa Mulenga: Diploma in Pharmacy, Evelyn Hone College, Lusaka
- Chilambwe Tapson: Diploma in Pharmacy, Evelyn Hone College, Lusaka
- Chifuwe Jabulani: Diploma in Clinical Medicine, Nkana College of Applied Sciences & Education, Kitwe
- Mumbwa Karen: Registered Nursing, Solwezi College of Nursing & Midwifery, Solwezi
- Soko Tina: Diploma in Clinical Medicine Sciences Psychiatry, Chainama College of Health Sciences, Lusaka
- Chinyangi Delinabu: Registered Nursing, North Western University College of Health & Applied Science, Lumwana
- Muunga Margaret: Diploma in Records Management, NIPA, Lusaka
- Kalunyangi Honesty: Diploma in Pharmacy, Apex Medical University, Lusaka
- Kefa Tridon: Teaching Diploma, South West College of Education, Solwezi
- Phiri Kennedy: Diploma in Clinical Medical Sciences General, Solwezi
- Katebe Longwe: Advanced Certificate in Heavy Equipment Repair, Northern Technical College, Ndola
- Kapelembe Charles: Diploma in Agribusiness Management, Cooperative College, Lusaka

Review of 2018/ 2019

A record number of students have been awarded grants this year due to the generous financial support from three organizations which recognize the value of the scheme. We wish to express our strong appreciation all three.

The success of the Education Grants Programme depends largely on the administration by the Lusaka based Coordinator, Sarah van Wyk. Sarah is now handing over to Whiteson Chenge a long-time supporter of the Trust and an experienced administrator and we thank him for accepting this vital role. We also thank Sarah for her excellent service to students and the Trust. Whiteson has recently retired having spent his working career in the aviation industry with Mines Air Services the forerunner to Roan Air, Zambia Consolidated Copper Mines, Zambian Airways, Zambezi Airlines & Proflight.

Student Appreciation

Extracts from emails to the Education Coordinator from three current students:

"I have just completed writing my final exams at Chainama College of Health Sciences in pursue of my Diploma in Clinical medicine. I want to take this opportunity to appreciate the financial support you rendered to me when I needed it most and I will always remain thankful to you as I am also looking forward to helping others who maybe in need once I get employed."

"I want to recognise the board of Zambia Society Trust education grant, the accounting department and other related members of staff. It is my great honour and privilege to give the word of appreciation to the trust for the kind assistance that was rendered to me last year in 2018. It was for this reason that I was able to complete my course in Agribusiness Management which I was perusing at cooperative college till 2018 December. I'm so grateful to all for this achievement I have obtained which without your financial assistances it wouldn't have been possible"

"I am honoured to be one of the recipients of an educational grant. Thanks to your generous support I'll be the first in my family to attend and finish college. Growing up in a less privileged community has not only offered financial and academic challenges but has also helped me realize the value of college education. My plans at this stage are to complete a major in Water Engineering at Natural Resources Development Collage. Your generous support will enable me to finish my career and get employed so that I can help the less fortunate and under-represented social groups. My educational pursuits would not be possible without generous support from grant organizations like yours. Thanks for enabling this opportunity!"



David Powell

Help for Orphans and Other Vulnerable Children: £14,000

Kwasha Mukwenu (Help Your Neighbour), Matero, Lusaka: £5,000

The Kwasha Mukwenu Ladies' Group was formed in 1991. Their original goal was to educate at least one child in a family of orphaned and less privileged children with the hope that this same child would then be in a position to support other siblings. After a while they extended their support to providing lunch to families where impoverished grandparents were unable to cope. They face an ongoing struggle to raise funds and some of the elderly ladies work as cleaners in the local brewery in order to create additional income. They have also ventured into other activities to generate income e.g. baking and making door mats for sale.



The following report has been received from the Kwasha Mukwenu Ladies:

“Kwasha Mukwenu received support from The Zambia Society Trust, the amount of K80,187. The grant was to cover education for orphans and vulnerable children.

Kwasha Mukwenu endeavoured to work on compliance with its objectives and aims as the report indicates in detail below.

Kwasha Mukwenu coverage area is still restricted to the town of Matero, Lusaka which is one of the towns with the majority of the population below the poverty bottom line with no social amenities for children but has quite a good number of schools and clinics.

Kwasha Mukwenu has a total number of 119 orphans under its care, there are orphaned children by HIV/ AIDS pandemic. In most cases these are double orphans heading households and a few single orphans under the care of a guardian or single parent.

Kwasha Mukwenu has been operating on the following budget upon which all activities are based.

We pay secondary school fees for all (119) of our children. 63 are girls and 56 are boys.

In addition to paying school fees we incur expenditure on rentals, post box, transport, medicine and stationery.

| | |
|---------------|---------------|
| | ZMW |
| School fees | 41,060 |
| Rentals | 6,000 |
| Post Office | 1,040 |
| Water | 1,300 |
| Electricity | 1,800 |
| Stationery | 310 |
| Communication | 360 |
| Transport | 1,151 |
| Total | <u>53,021</u> |



As Kwasha Mukwenu Women, we appreciate the support we receive to help the vulnerable children. So far, we have ZMW27,166,50 balance in our account. We shall continue paying school fee, when the time arises.”

Mathias Mbewe

Mpunde Mission Centre, Central Province: £3,000

Fr. Adam Pergóť who runs the Mpunde Mission Orphan Project writes to the Trust:

“A Zambian proverb in our Chi Bemba language says: “Umwana wa mupe, tafwa ku nsala” which means, “the child of a generous person does not die of hunger”. You have been helping our vulnerable children for many years; your financial assistance is the result of the care and affection you have for our country and its people. Our youngsters in the Mpunde area are your adopted children. You are an important part of their lives, and thanks to your help and support they have chance for a better and more joyful life.



Please allow me to thank you on behalf of everyone who has benefited from your financial donation, both children and their parents. The whole contribution (Kwacha 47,252.55) was distributed to help with children’s education and improving their living conditions.

Thanks to your generosity, we were able to purchase school uniforms for 42 children living in a very remote area located on the Lukanga Swamp. During the

rainy season this region (Chirwa Island) is cut off by floods from the rest of our area. 10 students of Chipepo High School were helped in paying for their school fees and received school bags, scientific calculators and hard cover books. Your funding also helped 14 school children in paying for their school fees, who would not have been able to continue their school education without your support. 45 children were given beautiful blankets and 50 children received soft pillows. I presume that for you having a blanket and pillow may seem obvious, but for our children it is a dream. Many of them sleep on bamboo mats covered with a simple piece of cheap material. In total 161 of teenagers benefited from your donation.

My dear friends and benefactors, thanks to your financial and spiritual support you are significantly improving the living conditions in our area and the lives of our young Zambians. We are beyond thankful for your help and assure you of our gratefulness and prayers.

I humbly implore you to continue helping our youth next year. Do not leave your adopted children without aid.

Thank you very much from the bottom of all of our hearts. We hope that you will see our gratitude in the enclosed pictures of the smiling faces of our children. May God bless you and your families!"

Mathias Mbewe

Chitsime Association, St Lawrence, Misisi Township, Lusaka: £3,000

This is a community-based project assisted by the Catholic parish of Kabwata. It comprises St Lawrence School, St Lawrence Home of Hope, Special Needs School, Home -based care programme and a computer centre.



Br. Jacek Rakowski writes.....

"Greetings from Lusaka and from Home of Hope.

It was just not so long ago when we were celebrating New Year and it's hard to believe, that we are nearing to the end of it. As usual for us, it has been intense and eventful year.

As usual, let me start with some statistics.

Since the beginning of January till the end of September we have received 53 new children, which for us is yet again a new record. Not by choice, but by necessity. Demand for our services is growing and unfortunately it seems to be coming from increased number of children getting separated from their families. During this year we have witnessed significant increase in new children on the streets of Lusaka and in the Copperbelt. Most of these are very young children, also the number of young girls has increased.

Today we have 68 boys living at Home of Hope, so we had to limit our presence on the street out of fear, that we will end up coming with a new child in the situation when we are already overcrowded.

During the same period of time (January till October) we have managed to reintegrate with their families a total of 32 boys, but till today we have had 3 instances of relapse, when reintegrated child ran again away from home and had to be readmitted into our facility.

Apart from boys living at Home of Hope we also have in our care 19 youngsters, who continue their education in boarding schools. Very soon (next month) 6 of them will have their Grade 7 exam and another 6 will write their Grade 9 exam. Judging by the midterm results from their schools, we anticipate that all of them will pass and graduate to higher grades.

One of our long-time caregivers (Mr. Jeremiah), has moved to greener pastures and we had to find his replacement. New teacher, Mr. Pius, is working with us already for three months and we can proudly say, that he is an asset to our “family”.

This year we have also managed to renovate and “upgrade” our home. All of boys’ dormitories have now floor ceramic tiles, all of them were repainted (including beds) and the whole house was repainted



and refreshed as well. You can see the results on attached photos. The house looks now more homely and child friendly. It is also a lot easier to keep it clean.

Just two months ago, after 20 years of partnering with Home of Hope, the Catholic Women’s League, has announced that they are pulling out from Home of Hope and want to focus on future work with girls. Effective from 31st December this year we are on our own! This announcement came to us totally unexpected and took us by surprise. Now we will have to restructure and learn to be on our own. What it means practically to us, is that we will have to create new structures (ownership change, new Board, bank accounts, etc.) and also assume some of the expenses which usually were taken care of by CWL: food and salaries for 4 of our 9 employees.

To be very frank with you, as of today we have almost 90 people to care for, and 2,400 USD on our account. It doesn’t look bright, but we are doing our best not to despair (yet).

We are expecting some humps on our way ahead but are confident that with guidance from Providence and help from well-wishers, we are going to come through and continue our service to some of the most vulnerable children from our society.

Six new children every month that for us a lot of travel and learning, as without knowing the families of our boys, we are not able to provide them and their families with meaningful and lasting help. For this reason, transportation is one of our biggest expenses.

As you already know, to make sure that upon leaving our home boys are well prepared to resettle in their families, we are providing them with “in house” education. For this purpose, we have employed diploma teacher, Mrs. Steila Phiri (who happens also to be the wife of one of our former boys Ruben Makasa). Kids are divided in age and competence appropriate groups and have at least three hours of classes every day. By the time they are ready to go back to formal school, they are at the same level with their peer.

Supplementing transport expenses and providing salary for our “in house” teacher, that is how we have used your donation for this year.

As always, we are very grateful for your friendship, love and support! Without you, the Zambia Society Trust, we would not be able to be as effective in our service to the children entrusted into our care.

Please receive our deepest gratitude!

United with you all and with best regards, on behalf of all members of Home of Hope.”

Mathias Mbewe

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

The Orphans and Vulnerable Children project at St Francis Hospital, Katete, was one of the first to be established in Zambia, starting in the early 1990s in response to the onset of HIV/AIDS that led to early deaths of many, especially 20 – 50-year olds.

The advantage of the scheme is that the children are cared for by members of their extended families, so do not lose contact with their relatives and their culture. Western-style orphanages cost per child as much as the wage of a labourer.

The scheme pays primary school costs for the children, such as exercise books, ballpoint pens. It also provides a contribution towards their clothing and some soap for their laundry. Each village has a guardian who oversees the children/families. The team from St Francis Hospital visits approximately 60 villages three times a year.

John Barnard

Football and Netballs: £2,000

This project started in 2005 and the Trust has now donated balls to schools in Zambia for 15 years. Initially it was decided that the Trust should target schools within the Ministry of Education. However, for the first 10 years we had to buy the balls from South Africa, involving freight and customs charges.



Five years ago, we learnt that an organisation “Alive and Kicking” had been established with a football and netball manufacturing facility in Lusaka with a London office. They also have workshops in Kenya and Ghana. Our Committee decided to use them, with our donations being channelled through London directly to Lusaka, a much more cost-effective method. Also, we decided to switch

our donations to Zambia Open Community Schools (“ZOCS”), often very basic and lacking in equipment. Over the 15 years, including 2019, we have donated balls to 15 schools each year with an estimated number of 800 balls in total.

ZOCS receive the majority of balls but in the last two years we have donated a small number of balls to Katete Hospital and Katete Girls Secondary school. ZOCS collect the balls from the Lusaka facility and then organise distribution, mainly to the more remote parts of Zambia.

We are happy to work with Alive and Kicking. In Lusaka they produce 24,000 balls each year. They have 45 employees, 40% with a disability, and 90% as a first job.

The Trust will continue to support ZOCS and Katete in the future, knowing this helps young people in Zambia with sporting activities.

Roger Thompson

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

The equipment made by APTERS provides physically challenged children with low-cost intervention tools which play an important role in their treatment and rehabilitation. The Trust is a long-term supporter of this social enterprise. Due to a number of third-party support members leaving Zambia, the Trust is now the major financial supporter of the APTERS project. The project is seeing an increase in the demand for its services, which now averages between 10 and 15 children each week.

The APTERS produce mobility aids using paper technology for physically challenged children. These include standing frames, chairs, wedges and walking frames. Their work offers the team, who themselves are physically challenged, economic and personal empowerment, through regular paid employment.

On his last visit to APTERS David Powell reported:

“It’s just over a year since my last visit and it was encouraging to see the improvements. The front of the building is freshly painted, the surrounding area cleared and all the inside rooms utilized for a specific purpose.

The bright waiting room has its walls covered by the handprints of friends and supporters and the assessment room walls covered by attractive animal scenes. The other rooms comprised two workshops, a storeroom and Kenneth Habaalu’s (Project Manager) office.



There were several mothers with their children waiting for assessment by Rebecca Banda and Ben Hulme. Rebecca is a physiotherapist employed in the Physiotherapy Dept of UTH who manages to assist at APTERS on Wednesdays. Ben is a nurse from UK who also attends on Wednesdays. He is not employed but is looking after his family as his wife works at Baobab School. Last

year the assessments were being made by Sarah Ash and another lady who have both now left Zambia. In conversation with Kenneth I learnt about the valuable improvements brought about by Sarah Ash.

In the workshop I met Twaambo working on an aid. He was a young man of 18 years who had been brought to APTERS as a baby and had benefitted from specific aids himself. Although not having proper use of one arm he is part of the team able to work making new aids.



I was asked to provide a wall handprint on behalf of ZST and Kenneth suggested a small plaque with the ZST logo to affix to the waiting room wall.”

Elisabeth Young & David Powell

Growing Communities: £2,000

In 2008, Grace Sholoma (a nurse), Jastin Sholoma (a farmer) and Evans Mubanga (a head teacher) were shocked at the level of poverty, deprivation and malnutrition that they saw in a widely dispersed community in a remote area of Serenje District, Central Province, Zambia. They developed a vision for a “Resource Village” in the area, and formed a local charity called “Pilgrim - Salt in Community” to implement their plans.

The local chief, Chief Kabamba, was very supportive and leased them the land, and they started to create the village from scratch in 2012, after engaging the commitment of the local people, who were, and are, excited to be part of this self-help project. The village, Kallilianama, now has:

- A thriving school plus adult literacy classes
- A church
- Cooperative agriculture and horticulture plus training in crop diversity and animal husbandry

The construction of a Health Post has recently been completed to Government specification and Pilgrim is in the process of equipping it with furniture and medicines.

They have cleared a 12-mile navigable track to the village from the main road, drilled a borehole for fresh water and built huts for visitors. They also have an ex Royal Mail red van for transportation, which is lovingly maintained by a qualified engineer who is part of the leadership team.

Everything is done in cooperation with the community. There are regular meetings with the local people to share and discuss plans and to agree priorities. At an early meeting a village head man said: *“you are offering us one end of a rope of hope - it is up to us to grab it”*.

Plans for next year include building a second classroom at the school (at the moment two classes use one room) and fully equipping the Health Post. In the longer term, when these have been shown to be successful, it is hoped that the Government will assist with funding for teachers and nurses. They also plan to introduce training in practical skills such as woodworking and tailoring and to create a sustainable tree plantation for fruit, nuts etc. and timber.

Funding for the village in UK is raised by the UK charity “Growing Communities - Zambia”.

John Barnard

Administration

Members

We have been pleased to welcome 6 new members this year.

The total membership continues to drop due to age and infirmity and other reasons and we ask you to encourage anyone you know with interest in Zambia to join the membership of the Trust.

Subscriptions, especially if gift aided where possible, are an essential aid to keeping up the grants for the various projects supported in Zambia. Due to the rising costs of postage we would urge those who are able to receive the newsletters electronically by email to do so.

Administration is made easier if subscriptions are paid by standing order and we appeal that members check annually that their banks have maintained the payments.

Thank you to all who have responded to reminders sent out recently. Please inform us if you wish to cease or have a change of address. A big thank you also to members who have added a donation to their subscription.

Eileen Hamilton

Publications: *ZST News and News from Zambia*

ZST News is published quarterly and provides illustrated updates on the projects we support in Zambia, with first-hand reports from visiting trustees or members. We also include accounts of fundraising activities, both those organised formally by the Trust and others undertaken by enthusiastic supporters. Its circulation used to be restricted to members, but just over a year ago the decision was made to make it available free to anyone interested in the work of the Trust. At the same time, we switched to the MailChimp service which also allowed us to add a sign-up form to the website. Since then more than a hundred new readers have joined the circulation list and it is interesting to note that half of these are located in Zambia. It is hoped that some of those who sign up for free will eventually become members. New subscribers, whether members or not, receive *ZST News* only by email. We urge the few members who still receive newsletters by post to change to an email subscription if they possibly can.

Anne Fraenkel

It is now two years since Sheila and I took over publication of *News from Zambia* for the Trust, Anne Fraenkel having been the Editor for ten years. The news sheet is sent out to 276 members by email and a further 62 members by post, mostly in the UK but some overseas. For several years the postal copies were printed and distributed by Kingsmead Community School in Somerset but as they are unable to continue doing so, *News from Zambia* and *ZST News* are now being produced by a local firm of printers in Kent. We are very grateful to Kingsmead for providing such a great service to the Trust.

We use a number of sources from the Zambian press, including *Times of Zambia*, *Lusaka Times*, *The Mast*, *Zambia Daily Mail*, *Reuters* and *Zambia Reports*. We try to achieve a fair balance between political news, social and economic developments, the environment and agriculture, health, tourism and various sports; also, some lighter items to give the news some variety.

Comments are always welcome to improve the editorial.

Roger Thompson

Cards and Merchandise

Last year the Trust launched a new and exciting range of promotional merchandise. The new range of T-shirts, mugs cards and bags has been very well received. The T-shirts have proven particularly popular.

The range of merchandise has been on sale at various events, but the challenge is to increase the number of events at which the Trust's merchandise can be marketed and the opportunity to sell merchandise via the website is also under consideration. I would welcome any opportunity to promote our merchandise and encourage any member or supporter who is holding an event or giving a talk on Zambia to contact me.

Val Pearson

Fund raising

We are immensely grateful to everyone who has kindly donated to us this past year, when we look at the figures it's always surprising how the amounts, great and small, all add up into a very worthwhile sum.

We had one golf day in Harrogate, organised once again by our Treasurer Andy Rose with his team of helpers and this raised an excellent £1,976.



There are a number of different methods available to raise money for the Trust without it costing you a penny. Yes, free money! Do you buy anything on Amazon? If so instead of logging onto the usual Amazon website, log onto the www.smile.amazon.co.uk website which is dedicated to supporting charity. Rest assured it looks and operates *exactly* like the usual Amazon website and still has your favourites and back order history. All you have to do is log into your account as normal and then register the name of the charity you wish to support (in this case The Zambia Society Trust). Once

you've registered your choice of charity then use this version of Amazon's website every time you make a purchase. The Trust will automatically receive 0.5% of the net eligible purchase price excluding VAT and carriage costs.

Then of course there is www.easyfundraising.org.uk. Register yourself and then your charity option (The Zambia Society Trust), and then using their search function look for the company you want to buy from. There's a huge selection from major retailers to holiday companies to insurance companies. If they're listed, then Easy fundraising will pay the Trust a small donation as long as you follow the link from the Easy fundraising website to your chosen merchant. Incredibly, over the years and without much publicity, we've raised in excess of £1,000 via Easy fundraising.

We're always looking for new ideas both to raise money and indeed awareness of who we are and what we do. If you've got something you'd like to discuss with us or can offer help in any way, please don't hesitate to contact us via email on fundraising@zambiasocietytrust.org.uk

Peter Fleming

Finance

The financial result for the Trust shows an overall income of £47,068 and, after deducting administrative expenses of £3,504 and charitable expenditure of £37,110, a net surplus of £6,454.

Trust generated income (including subscription income)

Overall the income from Trust-generated activities represents 40% of total income. Our activities this year included the sale of our hugely popular calendar and Hugo Daniel running in the London Marathon for us.

Donations

Donors can request that their donation be allocated to a specific designated fund such as the Orphan Fund or Football and Netball Fund, or donations can be allocated to the Unrestricted General Fund to be used as determined by the trustees.

We have been well supported this year. The Brighton & Hove Soiree Rotary Club, British Council for Africa and the Sir Ernest Cassel Education Trust awarded grants totalling £7,650 in support of our Education Programme. In June we received a substantial legacy donation of £10,000 from the estate of the late Derek Ingram.

In addition to the above donations we received £9,834 from 38 of our regular supporters and members. We are very grateful for their ongoing support.

Management and administration expenditure

Management and administration expenditure of £3,504, includes the cost of producing the Trust's 2019 calendar.

Andrew Rose

The Zambia Society Trust

Income and Expenditure account for the year ended 30 June 2019

| | Notes | Unrestricted Funds £ | Restricted Funds £ | Designated Funds £ | Total 2019 £ | Total 2018 £ |
|---|-------|----------------------------|--------------------------|--------------------------|--------------------|--------------------|
| Incoming Resources | | | | | | |
| Subscriptions | | 8,966 | | | 8,966 | 8,982 |
| Donations - General Funds | | 19,834 | | | 19,834 | 14,523 |
| Contribution to meetings | | 728 | | | 728 | 385 |
| ZST Merchandise | | 2,075 | | | 2,075 | 955 |
| Inland Revenue Tax Refunds | | 1,325 | | | 1,325 | 1,764 |
| Berkhamsted Golf Day - Orphans' Projects | | - | | | - | 7,624 |
| Harrogate Golf Day - Orphans' Projects | | | | 1,976 | 1,976 | 2,081 |
| Investment Funds & Deposits | | | | | | |
| Income from Investments | | | 2,991 | | 2,991 | 2,958 |
| Interest on COIF Deposit Account | | 126 | | | 126 | 61 |
| Specific Donations | | | | | | |
| Joy Goodacre Memorial Fund | | | 340 | | 340 | 240 |
| Education Fund | | | 8,050 | | 8,050 | 2,454 |
| Football & Netballs Fund | | | | | - | 50 |
| Ridge Hobson Fund | | | 72 | | 72 | 24 |
| Orphan Fund Appeal | | | | 585 | 585 | - |
| Total Incoming Resources | | 33,054 | 11,453 | 2,561 | 47,068 | 42,101 |
| Resources Expended | | | | | | |
| <i>Charitable Expenditure</i> | | | | | | |
| Grants to Individuals | 4 | | 17,000 | | 17,000 | 14,000 |
| Grants to Orphan Projects | 5 | | | 14,000 | 14,000 | 11,000 |
| Grant to APTERS | 5 | 2,000 | | | 2,000 | 2,000 |
| Grant to Growing Communities | | 2,000 | | | 2,000 | - |
| Football & Netballs Fund | 5 | | | 2,000 | 2,000 | 2,000 |
| Bank charges - grant transfers to Zambia | 5 | 110 | | | 110 | 175 |
| <i>Management & Administration</i> | | | | | | |
| Sundry expenses | | 324 | | | 324 | 754 |
| ZST Merchandise | | 1,070 | | | 1,070 | 1,972 |
| Meeting expenses & AGM | | 688 | | | 688 | 860 |
| Newsletters & Annual Report | | 1,151 | | | 1,151 | 450 |
| Website and Social Media development | | 271 | | | 271 | 1,196 |
| Total Resources Expended | | 7,614 | 17,000 | 16,000 | 40,614 | 34,407 |
| Net Incoming/ (Outgoing) Resources | | 25,440 | (5,547) | (13,439) | 6,454 | 7,694 |
| Fund balances brought forward at 1 July 2018 | | 27,271 | 97,060 | 9,755 | 134,086 | 128,105 |
| (Decrease)/increase in investment unit values | | | 943 | | 943 | (1,713) |
| Transfers from Unrestricted Funds | | (9,784) | 3,539 | 6,245 | - | - |
| Fund Balance as at 30 June 2019 | | 42,927 | 95,995 | 2,561 | 141,483 | 134,086 |

The Zambia Society Trust

Balance Sheet as at 30 June 2019

| | Notes | 2019 £ | 2018 £ |
|----------------------------|-------|-----------------------|-----------------------|
| Cash at bank | | | |
| NatWest Current Account | | 24,126 | 20,789 |
| COIF Deposit Funds | 6 | <u>25,030</u> | <u>21,913</u> |
| | | <u>49,156</u> | <u>42,702</u> |
| Investments | | | |
| Ridge Hobson Fund | 7 | 51,505 | 50,979 |
| Joy Goodacre Memorial Fund | 7 | 15,207 | 15,052 |
| Education Fund | 7 | <u>25,615</u> | <u>25,353</u> |
| | | <u>92,327</u> | <u>91,384</u> |
| Net current assets | | <u>141,483</u> | <u>134,086</u> |
| Represented by: | | | |
| Restricted Funds | | | |
| Ridge Hobson Fund | 7 | 53,270 | 52,665 |
| Joy Goodacre Memorial Fund | 7 | 16,280 | 15,758 |
| Education Fund | 7 | <u>26,445</u> | <u>28,637</u> |
| | | <u>95,995</u> | <u>97,060</u> |
| Designated Funds | | | |
| Football and Netballs Fund | | - | 50 |
| Orphans Fund | | <u>2,561</u> | <u>9,705</u> |
| | | <u>2,561</u> | <u>9,755</u> |
| Unrestricted Funds | | 42,927 | 27,271 |
| Total Funds | | <u>141,483</u> | <u>134,086</u> |

The Accounts were approved by the Trustees on 16th November 2019

John Barnard
Chairman

Andrew Rose
Treasurer

The Zambia Society Trust

Notes to the accounts for the year ended 30 June 2019

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

| | 2019 | 2018 |
|--|------------|------------|
| Funds transferred to Zambia | £17,000 | £14,000 |
| Balance retained in Zambia as at 30 June | ZMW 14,705 | ZMW 26,292 |

The Zambia Society Trust

Notes to the accounts for the year ended 30 June 2019

5. GRANTS TO PROJECTS

| | 2019 | 2018 |
|-------------------------------------|---------------|---------------|
| | £ | £ |
| <i>Grants to Orphan Projects</i> | | |
| St Francis, Katete | 3,000 | 3,000 |
| St Lawrence, Misisi | 3,000 | - |
| Mpunde Mission | 3,000 | 3,000 |
| Kwasha Mukwenu | 5,000 | 5,000 |
| | <u>14,000</u> | <u>11,000</u> |
| <i>Football & Netballs Fund</i> | | |
| Football & Netballs purchased | 2,000 | 2,000 |
| <i>Other Grants</i> | | |
| APTERS | 2,000 | 2,000 |
| Growing Communities | 2,000 | - |
| | <u>20,000</u> | <u>15,000</u> |
| Bank charges | 110 | 175 |
| | <u>20,110</u> | <u>15,175</u> |

6. COIF Deposit Fund

| | 2019 | 2018 |
|----------------------------|---------------|---------------|
| | £ | £ |
| Represented by: | | |
| Restricted Funds | | |
| Education Fund | 830 | 3,284 |
| Joy Goodacre Memorial Fund | 1,073 | 706 |
| Ridge Hobson Fund | 1,765 | 1,686 |
| Designated Funds | | |
| Football and Netballs Fund | - | 50 |
| Orphans Fund | 2,561 | 9,705 |
| Unrestricted General Fund | 18,801 | 6,482 |
| | <u>25,030</u> | <u>21,913</u> |

7. Restricted Funds

| | Unit Quantity | Unit price £ | Unit value £ | Deposits £ | Total 2019 £ | Total 2018 £ |
|----------------------------|------------------|-----------------|-----------------|---------------|--------------------|--------------------|
| Ridge Hobson Fund | 37,578.46 | 1.3706 | 51,505 | 1,765 | 53,270 | 52,665 |
| Joy Goodacre Memorial Fund | 11,095.15 | 1.3706 | 15,207 | 1,073 | 16,280 | 15,758 |
| Education Fund | 18,688.87 | 1.3706 | 25,615 | 830 | 26,445 | 28,637 |
| | | | <u>92,327</u> | <u>3,668</u> | <u>95,995</u> | <u>97,060</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 2019, which are set out on pages 16 to 19.

Respective responsibilities of Trustees and examiner

The charity's Trustees are responsible for the preparation of the accounts. The charity's Trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- to state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from you as Trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

1. which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with section 130 of the 2011 Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act have not been met; or
2. to which, in my opinion, attention should be drawn 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

16th November 2019

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 Officers of the Trust and members of the Trust Committee are elected at the Annual General Meeting. The Trust does not employ any staff: The Officers and Committee members are all volunteers. The Chairman, Treasurer, Secretary and Editors of the publications are entitled to receive a contribution towards their expenses. By kind permission of HE the Zambia High Commissioner, Annual General Meetings of the Trust are usually held at Zambia House, 2 Palace Gate, Kensington, London. Most Trustee meetings are held at 106 Doreen Ramsay Court, The Cut, London.

Registered charity number: 1008155

BOARD OF MANAGMENT

Patrons

Caroline Marsh
Geoffrey de Mornay Davies

President & Vice President

President: James Cairns

Officers

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

Trustees

Peter Fleming
Anne Fraenkel
Eileen Hamilton
Mathias Mbewe
Ben Van Nes
Val Pearson
David Powell
Roger Thompson
Elisabeth Young
and the Officers of the Trust.

Bankers

NatWest PLC
25 High Street
Colchester
CO1 1DG

Independent Examiner

Silvernos Chinganga MSc ACMA CGMA

FOLLOW US



@ZAMBIASOCIETY



The Zambia Society Trust



www.zambiasocietytrust.org.uk

SUPPORT US

Any person over the age of 18 years may become a member on payment of a minimum subscription of £30 a year. Institutions, firms and companies are welcome to join as corporate members on payment of a minimum annual subscription of £50.

Application forms are available from our website or from the Membership Secretary:

Eileen Hamilton

Flat 8, Doreen Ramsay Court, 108 The Cut, London SE1 8LN.

Email: ehamilton95@hotmail.com

If you would like to make a one-off donation to support the work of the Trust, please download a Gift Aid form (if you are a UK taxpayer) so that we can reclaim the tax, and send it together with your cheque made payable to the Zambia Society Trust to:

Andrew Rose

Croft House, Mungrisdale, Penrith, Cumbria, CA11 0XR

Email: andrew.rose@zambiasocietytrust.org.uk

