



## Annual Report and Accounts 2024

Registered charity number: 1008155

## Highlights of the Year.....

- ✓ Supported the education of 643 school children.
- ✓ Enabled 57 students to continue their higher education.
- ✓ Entered into a partnership with Book Aid International to supply text and reading books.
- ✓ Successful Christmas Appeal: £4,195 for APTERS project.
- ✓ Income of £124,000 including £69,000 of legacy donations.
- ✓ Charitable expenditure of £49,000; representing 86% of the previous year's income.
- ✓ Established a Zambia based volunteer team.
- ✓ Tim Legge's first year as Chair!

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*Front Cover: top right clockwise: boys at Home of Hope, Kenneth the APTERS manager with ZST volunteer, Chileleko Siazanda, schoolgirls in receipt of ZST netballs, Aaron Tasha Mashilipa at his graduation day.*



## Message from our Chair



I was honoured to be elected as Chair of The Zambia Society Trust during our 2023 AGM. I took over from John Barnard, who chaired the Trust with distinction for 12 years. Any apprehension that I felt was quickly dispelled by the fulsome support, encouragement and guidance which I have received from our very committed and hardworking trustees and members of our committee in Zambia. I must make particular mention of Andrew Rose, our excellent treasurer, who gives very generously of his time and professional expertise. My thanks are also due to Anne Fraenkel, who has continued to produce the monthly News from Zambia and has also taken on the role of temporary secretary. This leads me to express my gratitude to Jenny Healy, who has retired as our secretary after

many years of dedicated service

During the last year, our charity has continued to support children and young people in Zambia through our important bursary scheme and our support of 5 very worthwhile projects. I have been privileged to visit all of these projects, most recently in July, August and October. This has enabled me to see the excellent work that is undertaken by the leaders, staff and volunteers and to meet some of the children and young people who benefit. I intend to continue my programme of visits once or twice per year.

Our activities are made possible by the encouragement and generous support of our members and friends, through subscriptions, donations, fundraising and legacies. An example is our highly successful Christmas 2023 appeal for APTERS, which exceeded all expectations. The legacies which we have received during the last 12 months have strengthened our financial position. This has enabled us to agree a strategy of increasing our funding of each project. In recognition of the increase in food prices in Zambia, we will make one-off payments to the Home of Hope Boys' Home, Kwasha Mukwenu School and the Pilgrim School, to help them continue to provide meals to their children, which are so important for their well-being. We are also paying for additional desks for these 3 projects and the supply of reusable sanitary pads for girls at the Kwasha and Pilgrim schools, to prevent them from missing lessons for several days per month.

In May of this year we held a social event at the Zambia High Commission. We were honoured to be addressed by the High Commissioner, Her Excellency, Macenje Mazoka. We are very appreciative of her support and that of her team.

An exciting development has been the signing of a partnership agreement with the Charity Book Aid International. This has resulted in the wonderful donation of over 1,000 new text and reading books to Kwasha Mukwenu School, the Pilgrim School and the Home of Hope, which provides in-house education to some of their boys. I saw the books in October, shortly after their arrival in Lusaka. Our next step is to arrange training for the teachers to ensure that the books are used to best effect.

**Tim Legge**

# 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 2024. 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.

## Achievements and Performance

The strategy of the Trust is to be a long-term and reliable partner to all the projects we support. This enables the projects to operate knowing that the funds they receive from the Trust are not one-off in nature.

During the year Tim Legge has made extended visits to Zambia visiting all of the projects we support, developing a working relationship with the various project leaders. In addition, Tim has continued the Trust's work of developing a Zambia based volunteer support group. This has enabled a better understanding of the needs of each project. This is more important than ever as Zambia struggles with drought, power outages and food price inflation.



The Trust has been, for a number of years, supporting the education of girls. At least 50% of the education bursaries we award annually are to girls. Encouraging and supporting girls in their Grade 1 to Grade 12 education is an area of increased focus for the Trust.

*Tim and three of our volunteers: Alice Banda, Mwate Nampemba and Tainess Khondwe with Brother Jacek at the Home of Hope.*

## Kwasha Mukwenu Community School, Lusaka

The school for needy children provides classes for pupils from Grade 1 to Grade 9 with four teachers led by head teacher, Christopher Lwele. The number of pupils enrolled for the school year to May 2024 was 218. Of which 120 were girls and 98 were boys. To encourage attendance the school continues to provide pupils with lunch, which given food prices are high is an added bonus.

With the support of the Trust the school has achieved the following during the year:

- Improved literacy standards amongst its pupils; children in grades three and four are now able to read.
- Constructed two additional classrooms which has enabled an increase in pupil numbers.
- Purchased desks for grade seven school children.
- Cleared the school environment due to encroaching grasses and improving drainage.
- Registered the school with PACRA (Patents and Companies Registration Agency) and is now working towards registration with the Ministry of Education.



*Left: Mwate Nampemba providing health and safety advice. Below: Gretta Hudson meeting pupils.*



The Trust is heavily engaged with the school through our volunteers in Zambia, Bernard Lusale and Mwate Nampemba and visits by Tim Legge and Gretta Hudson during the year. Bernard has provided help and support with school governance and Mwate has given presentations to the children one of which included health and safety advice to the young girls. During his extended visits Tim Legge has also held meetings with the headteacher and given talks to the school's pupils.

As the school's major donor we are actively working with the head teacher and school leaders to enable them to meet the challenges they are currently facing, which are:

- An inadequate number of school desks, and as a result many children are having to learn to write sitting on the floor.
- A lack of teaching and learning material. The Trust has partnered with Charity Book Aid International to provide both text and reading books during the next financial year.

- A continuing lack of learning space. Additional classrooms are needed to meet the increased demand for places.
- Recruiting and retaining additional teachers is a challenge. The salaries the school is able to offer are insufficient to attract newly qualified teachers.
- Improving attendance rates for girls with the provision of sanitary products.

## **Mpunde Mission Centre, Central Province**

Mpunde Mission is a Catholic centre situated in a remote area to the west of Kabwe. It is led by Father Adam Pergol, who is responsible for many parishes across a large district. He uses the funds which the Trust allocates him to pay school fees for disadvantaged children to attend Mpunde Mission's primary and secondary schools or other schools nearby. Our funds also cover the cost of tuition fees to enable students to undertake college or university studies.

Tim Legge and Tainess Khondowe, one of our local volunteers, visited Mpunde Mission in July of this year. Father Adam kindly hosted them overnight in his presbytery. This gave them the opportunity to learn about his work and in particular his support for the underprivileged students whom he carefully selects for sponsorship, choosing those who have ability and commitment to their studies. Tim and Tainess were delighted to meet eight well-motivated young people. Five of them are currently being sponsored through school and nursing college with the aid of the Trust's financial support. Of the other three young people, two have completed their nurse training and the other is now working as a teacher.

Father Adam has written:

"I would like to express our gratitude and thank you most sincerely for your generous donation. The entire donation was used to support 27 clever children and youths from underprivileged and poor families. Thanks to your help, a 15 year old girl named Mazumba Malambo was able to undergo surgery on her elbow, which had been disabled since birth. Five of the supported children study in colleges and twenty two continue their education in high schools. The children were helped to pay school fees, buy school supplies and purchase groceries and food. I would like to mention that this year Zambia is experiencing the tragedy of drought and famine. Parents struggle to feed their families, therefore part of the donation was allocated to food for our students.

"Let me describe the achievements of some of our college students. All of them were sponsored by you in their secondary school and now they are fulfilling their dreams by continuing their studies in colleges. Mumba Sokontwe and Andrew Kalunga have completed three years of nursing studies. Chiemia Chimutobe always dreamed of being a teacher and she is in her first year at teachers' college. The best example is Ephraim Njovu, who graduated from Nkrumah University last year and is currently employed by Mpunde High School. My dear friends, you have been doing a great job by helping our people. It is only thanks to your help that they finish school and get a job. We are extremely grateful for your support. You are always remembered in our prayers."





*Tim and Tainess Khondowe with Father Adam and the eight young people sponsored by Mpunde Mission.*

## **Home of Hope, Lusaka**

*[www. stlawrencehomeofhope.com](http://www.stlawrencehomeofhope.com)*

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 and placed there by Social Services and the Police. 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.

The Trust is a long-term supporter of the Home of Hope and during his recent visit Tim Legge was informed that our consistent support over many years is especially appreciated. Our support, which is long-term, enables Brother Jacek to manage the Home of Hope in the knowledge that our support is not short-term.

In his latest report to us Brother Jacek writes:

*“We are delighted to share our 2024 annual report, reflecting on both the achievements and challenges we've encountered this year at the Home of Hope. Every child we care for has endured significant trauma, affecting not only their individual well-being but also their families. We remain committed to their recovery and reintegration, guided by our core principles of Rescue, Restore, and Reunite.*





Above: Brother Jacek with Home of Hope boys and assistants.

This year, we started with 87 children in the facility and admitted 84 new boys between January 1st and October 15th, bringing our yearly total to nearly 100 admissions. Around 90% of these children were referred to us by Social Services, Police, and Courts, while 10% were identified through our street outreach efforts. In the last three months alone, we've welcomed 33 new children, many between the ages of 4 and 7, including several sibling groups.

During this year, we successfully reunited 52 boys with their families, though 26 boys unfortunately ran away—a poignant reminder of the difficult pasts and emotional wounds many of these children carry. In total, we have worked with 189 children and their families this year, and our records now reflect a database of 1,158 children.

At present, 89 boys reside in our facility, and 5 boys attend boarding schools. We continue to support the education of 14 boys who were reintegrated in previous years. Notably, two of our young men, Mishek and Frank, are pursuing diplomas in pharmacy and electrical engineering, respectively. Additionally, two more graduates—Paul, studying physiotherapy, and Savior, studying pharmacy—have enrolled in college this year.

Our mission remains grounded in the 3 R's:

- Rescue: We remove children from the streets or unsafe environments.
- Restore: We provide for their physical, emotional, spiritual, and educational growth.
- Reunite: We work to reconnect children with their families or place them with safe guardians, ensuring a stable future for them.

Despite our progress, Zambia continues to face harsh challenges, particularly the ongoing drought, which has impacted nearly every aspect of daily life, including the cost of basic goods. For example, the price of mealie-meal, a staple for us, has risen from ZMW 180.00 in January to ZMW 380.00 per 25kg bag today. We need at least one bag a day to feed the children. Many other essentials, such as tomatoes and sugar, have also seen steep price increases. These hardships have led to a growing number of children being surrendered to Social Services or abandoned, often by single mothers struggling to provide for them.



*The new dining room at Home of Hope, showing tables and benches made by the boys.*

Despite these difficulties, we are incredibly blessed to have such generous friends. Thanks to donations from supporters in the Netherlands and Ireland, we now have a solar power backup system that has been crucial during the ongoing energy crisis. This system ensures we have uninterrupted electricity, and our solar-powered water pump provides us with running water at all times, a critical asset during frequent power cuts caused by the drought. Additionally, we received a new vehicle, generously donated by our friends in the Netherlands. This vehicle will greatly improve our ability to carry out tracing and reintegration programs, ensuring smoother operations over the next decade.

We extend our deepest gratitude to the Zambia Society Trust for your unwavering support and commitment over the years. Your help has been essential to sustaining our mission and expanding our impact. Without your support, the work we do to change the lives of these children and their families wouldn't be as profound.

Thank you for accompanying us on this journey. We look forward to continuing our partnership and making further progress toward a brighter future for Zambia's children."

## **Pilgrim - Salt in the Community (Growing Communities)**

*www.growingcommunitieszambia.com*

Pilgrim - Salt in the Community was established in 2012 by local Zambians as a 'Resource Village' to bring practical help and encouragement to people living in small, widely dispersed settlements in an impoverished area in Kalilanama, Serenje District. Chief Kabamba kindly agreed to allocate a large parcel of land for the project, and he continues to be an active supporter.

The project comprises four inter-connected strands of activity:

**Education:** Pilgrim School has seen steady growth and there are currently about 140 students in three classes from Pre-Grade to Grade 6. There is pressure on girls to leave e.g. to help look after elderly relatives or babies, or to marry. Lunch is provided for the students, but this has not always been possible recently due to the catastrophic effects of the drought. There is an active parent teacher group and adult literacy classes for parents. The school has been pleased to welcome visits from District Education Officers to encourage the children, from Ministry of Education Officers to encourage parents to work with the project and from the Police service to warn against drug and alcohol abuse and early marriage. We have applied for a government grant to support families whose children are absent from school due to lack of food, shoes and clothing.

The school has recently installed a solar powered pump for the bore hole.

There is an urgent need for more desks and chairs. In future, laptops will be needed for computer studies. An additional classroom and teacher is also a priority. On Independence Day (24th October) all the surrounding schools and the local community came to Pilgrim School for celebrations.

**Health:** The Health Post is open each weekday and on weekends for emergencies. There are three part time staff, including a trainee from the community. The Government provide medicine for malaria, but nothing else, so resources are low. Local government health staff came recently to vaccinate children under five and girls aged twelve and over. There is an urgent need for essential drugs and basic equipment, including a solar vaccine fridge.

**Agriculture and Livestock:** Field and garden crops have all been badly affected by the drought, which has also caused the newly established fish ponds to dry up. This year there will be early preparation and planting to ensure the best possible crops. There are ten pigs in the piggery. 10,000 bricks have been made by the community for the construction of a secure poultry house.

**Church:** Hope Church continues to hold regular Sunday services and to visit outlying villages to give pastoral support and conduct bible studies.



Accommodation has been built for all of the workers, and space is also available for visitors, who will be very warmly welcomed. It is pleasing to see people from the area coming together around this project, and being encouraged to take on leadership responsibilities.

During their visit to Pilgrim - Salt in the Community Tim Legge and Tainess Khondowe had the opportunity to meet the project founders and teachers to gain an understanding of the needs and challenges facing the project.

## **APTERS (Appropriate Paper Technology) Group ('APTERS')**



Kenneth Habaalu, the Manager, and Karen Edwards, the Chair of the support group have written:

*"APTERS is an organization of people with disabilities whose primary purpose is to make low cost, assistive devices for children with disabilities. All of the assistive devices are manufactured using recycled materials, mainly cardboard and paper.*

*This year has been a successful year so far for APTERS. At present we are the only organization in Zambia which provides assistive devices to children with disabilities. We have served children from across the country from Lusaka to Livingstone and from Mongu to Mansa. We continue to charge families for the devices but subsidise the cost for the majority of parents who are unable to afford the full amount. Charging for the devices means that parents tend to make a commitment to using the device for the child and will take better care of it, and gives a sense of independence, rather than receiving the device for free. Each assistive device costs 600 Kwacha (equivalent to c£20) and on average most parents make a contribution of 200 Kwacha (equivalent to c£7) per device*

*The staff at APTERS are mainly people with disabilities who would otherwise find it very difficult to gain employment, this includes people with learning disabilities, deaf and physically*



*challenged. Mothers of disabled children who would otherwise not be able to work due to their family commitments are also employed by APTERS.”*

Our Christmas Appeal in support of APTERS was a great success and raised an additional £4,195. In total we were able to increase our grant to APTERS to £6,000 which is the equivalent of funding 450 disability devices. The grant and the additional support after the Christmas Appeal has enabled APTERS to increase the number of assistive devices made for children with disabilities. With the support of our grant APTERS has so far this year been able to produce the following disability devices:

- 1078 special chairs.
- 877 standing frames.
- 315 wedges for physiotherapy exercises.
- 164 rollers for physiotherapy exercises.
- 183 walking frames.

An average of 290 disability devices are being produced on a monthly basis which is the equivalent of nearly 3,500 disability devices per annum.

In addition to funding an increase in the production of disability devices our additional funding has enabled APTERS to:

- Reinforce and supplement the fencing around the APTERS building, garden and car park. This work was essential as intruders were stealing wiring from the nearby University Teaching Hospital and using the APTERS premises to strip this wiring down to sellable copper cabling. In addition children were squeezing through our original fencing and using the premises as a playground putting themselves and APTERS stored materials at risk.
- Provide overalls for all staff members. Previously staff wore the own clothing and had no protection other than disposable gloves and aprons. Having overalls has enabled APTERS to cut down expenditure on disposable aprons and provide superior protection for clothing
- Repaint the premises. A local artist is helping APTERS by painting wall motifs to enable a more child-friendly environment.



## Footballs and Netballs

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.

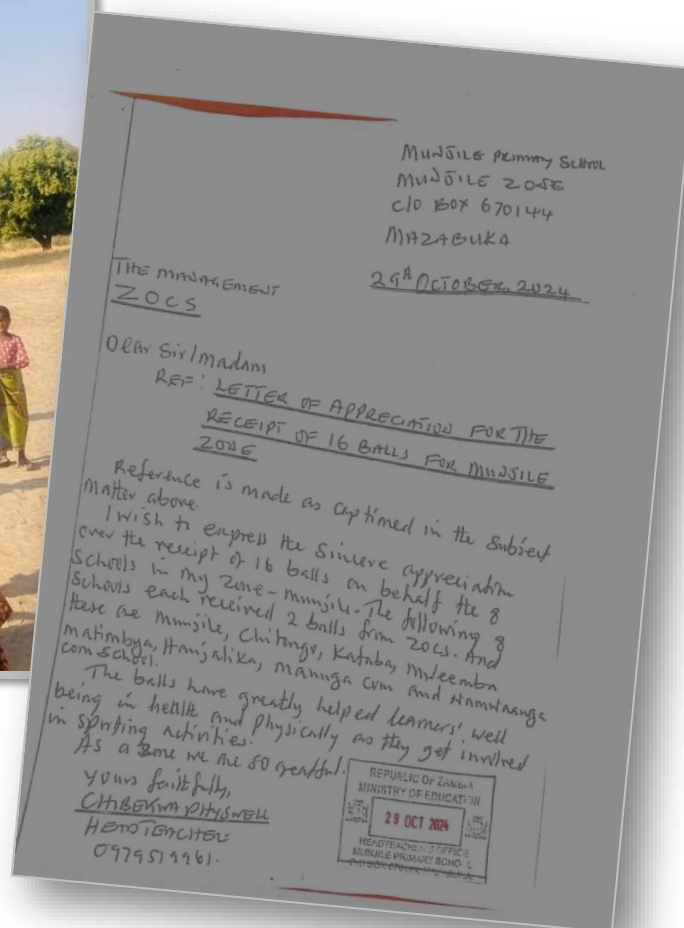


Over the years, Alive & Kicking has donated footballs and netballs to Community Schools through Zambia Open Community Schools (ZOCS). This gesture has seen thousands of learners enjoy attending school where apart from learning, they enjoy playing football or netball. A total of 146 balls funded by the Zambia Society Trust were collected by ZOCS for distribution in Community Schools. Riding on the availability of transport to project sites in different parts of the country, the organisation managed to distribute to different schools 130 balls in three major districts as outlined in the table below. The difference of 16 balls is due for distribution next week in Lufwanyama district. The schools were receiving two balls each (one football and one netball) however, some schools with different streams of learners (morning and afternoon groups given the high enrolment) received doubled the number.

The footballs and netballs are considered helpful for learners for the following reasons;

- Enhance collaborative abilities, self-confidence and social skills in children in Community Schools and the youths in communities (youths use school grounds for sports).
- Encourage children to broaden their talents since understanding the principles of one sport makes it simpler to learn the regulations of another.

- Early physical education at school teaches the concept of collaboration whereas being part of the team provides vulnerable children with the feeling of identity.



## Education

During the 2023 academic year the Zambia Society Trust was able to support 40 new students and 17 continuing students. The Selection Committee in Zambia headed by Whiteson Chenge receives the applications and after checking that they meet the Trust's criteria and have included all their documents forward them to the U.K. The Education Sub Committee of the Trust then meet in London and make the final decision as to who will receive a grant towards their studies.

The support of the Society's members and additional help from the Business Council for Africa enable us to continue this vital work. Each year the number of applications for grants seems to increase and we must ensure that we do not create too much work for the Committee in Zambia who then have to distribute the funds directly to the Students, Colleges and Universities.

The following is a list of the 40 students for whom we are able to provide first year funding for in 2023.

<i>Name</i>	<i>Sex</i>	<i>Course</i>	<i>Age</i>
<i>Allen Phiri</i>	M	B.A. Medicine	25
<i>Barbara Sweta</i>	F	Dip. Public health Nursing	28
<i>Mwanya Katongo</i>	M	Dip. Civil Engineering	23
<i>Nora Mautsa</i>	F	B.A. Banking and Finance	23
<i>Kapatuka Nyrenda</i>	M	B.Sc. Sust Health & Enviro.	29
<i>Florence Mbuzi</i>	F	B.Sc. Medicine & Surgery	26
<i>Rozario Banda</i>	F	Dip. Dental Surgery	22
<i>John Sumpa</i>	M	Public Health Nursing	21
<i>Mary Mubanga</i>	F	Dip. Clinical Officer	25
<i>Meila Siamoonga</i>	F	Dip. Nursing	20
<i>Njivwa Tombi</i>	F	Law	20
<i>Mercy Chali</i>	F	Dip. Midwifery	22
<i>Mukelabai Namakando</i>	M	Advanced Dip. in Accounts	32
<i>Nkisu Mupatayi</i>	M	B.Sc. Pure Maths	26
<i>Ntomi Kondowe</i>	F	Dip. Clinical Medicine	26
<i>Patricia Kapijimpanga</i>	F	B.Sc. Nursing	25
<i>Saliifyanji Mwandia</i>	F	B.Sc. Medicine	21
<i>Violet Chikalie</i>	F	B.A. Medicine & Surgery	28
<i>Precious Chilufya</i>	F	Dip. Registered Nursing	22
<i>Kavumbi Chingemba</i>	F	B.Sc. Diagnostic Radiography	24
<i>Eleazer Daka</i>	M	Civil Engineering	22
<i>Martha Mlutula</i>	F	Dip. Agribusiness Management	26
<i>Martin Kabumba</i>	M	Public Health	29
<i>Maxwell Simbwachi</i>	M	Nursing	22
<i>Collins Kanchule</i>	M	Secretarial and Office Management	29
<i>Carren Bwalya</i>	F	Diploma in Registered Nursing	20
<i>Belita Chitambo</i>	F	B.A. Pharmacy	26
<i>Judith Chimtingiza</i>	F	B.Sc. Banking and Finance	22
<i>Phangiwa Mwanza</i>	F	B.A. Law	20
<i>Fumbelo Chipipa</i>	M	B.A. Public Administration	24
<i>Moses Kuputo</i>	M	B.A. Theology	28
<i>Charity Nachula</i>	F	Dip. in Clinical Medicine	20
<i>Elijah Nchito</i>	M	B.A. Information Technology	22



<i>Purity Nyambe</i>	F	B.A. Education	33
<i>Petronella Lwimba</i>	F	Dip. Purchasing and Supply	21
<i>Chanda Mumba</i>	F	Dip. Agribusiness Management	21
<i>Nancy Yowela</i>	F	B.Sc. Transport and Logistics	21
<i>Evelyn Ngoma</i>	F	Diploma in Registered Nursing	23
<i>Harrison Mwanza</i>	M	Diploma in Registered Nursing	22
<i>Annie Musonda</i>	F	Diploma in Pharmacy	20

In 2023 we were also able to support the following 17 students for a 2<sup>nd</sup> year so that they were able to finish their courses.

<i>Name</i>	<i>Sex</i>	<i>Course</i>
<i>Moomgo Chimuka</i>	M	Information Technology
<i>Carol Kayumba</i>	F	B.Sc. Development Studies
<i>Patrick Mapulani</i>	M	Diploma in Clinical Medicine
<i>Mukuuka Mutale</i>	F	B.Sc. Transport & Logistics
<i>Mapalo Chewe</i>	F	B.Sc. Engineering Agriculture
<i>Swence Nakamba</i>	F	Diploma in Marketing
<i>Mpanjilwe Simbeye</i>	M	Diploma in Agricultural Education
<i>Namakau Mukela</i>	F	Registered Nursing
<i>Mutale Kafebe</i>	F	Veterinary Medicine
<i>Kasamba Mweene</i>	F	B.A. Science in Human Biology
<i>Jean Kapilya</i>	F	B.A. Law
<i>Chongo Mulengo</i>	M	Theology
<i>Transfildah Kasiya</i>	F	B.Sc. Clinical Sciences
<i>Simwaba Phillip</i>	M	B.Sc. Public Administration
<i>Chisaka Penolope</i>	F	Nursing & Midwifery
<i>Kinda Mbilima</i>	M	B.Sc. Public Administration
<i>Sibuchi Cliff</i>	M	B.A. Business Studies

In Total we sponsored 63 Students in 2023. The Trust continues to receive letters of thanks from the students that we supported and we know that some of them have achieved excellent results and have gone on to be valued members of their community.

We receive many letters of thanks from students, which are most appreciated. Here are just two:

*"I've always been fascinated by computers and technology since I was young. Learning about the development of technology and its advancements has been an inspiring journey, especially when it comes to system analysis and software development."*

*I recently completed my studies in IT at Mulungushi University, and I'm grateful for the experience. The Zambia Society Trust (ZST) grant was a game-changer for me - it was a massive weight off my shoulders, allowing me to focus solely on my studies without any financial burdens. I'm deeply grateful for their support and generosity; it's because of their trust in me that I was able to complete my degree without any financial stress. The grant not only covered my tuition fees but also gave me peace of mind, enabling me to concentrate on my academic goals. I appreciate the Zambia Society Trust's investment in my future and their contribution to shaping my career.*

*Looking back, I'm proud of how far I've come. My passion for IT has only grown stronger, and I'm excited to apply my skills and knowledge in the real world. I'm ready to take on new challenges and make a meaningful contribution to the IT industry"*

***Elijan Chilufya Nchito***

"I am writing this letter to thank you for the grant award for it helped me a lot and I truly appreciate it.

No words could possibly express how happy I was when I was informed that I had been chosen and sponsored by you to receive a grant.

Thank you so much for your generosity. It is a privilege to be chosen for this award for the year 2022. The grant helped me pay tuition fees in my final year of 2022 at Evelyn Hone College. Without your help it would have been difficult to pursue a career in human resource. I completed a diploma in human resource and I was among the graduating students.

I thank you once again for your grant!"

***Aaron Tash Mashilipa***

## **Administration and Fundraising**

### ***Membership***

Overall membership numbers remain relatively constant. We do though continue to attract new supporters either as a member or a regular donor. Nearly all new members are signing up via our website and JustGiving remains a popular website for supporters to make regular donations.

We ensure our members and supporters are kept informed, on a regular basis by email and by our social media blogs, 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.

In addition, for members only, we produce a monthly round up of news from the Zambian press called *News from Zambia*.

During the year the decision was taken to stop the distribution of ZST News and the News from Zambia via hardcopy. A combination of a reduced number of recipients and the increased cost of printing was sadly too high to justify its continuation.

## Fundraising

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

We are extremely grateful to everyone who generously supported our Christmas Appeal in support of APTERS. The Appeal raised £4,195 which exceeded all expectation and will provide the APTERS team with the funds to undertake both remedial work to their facility and to enable production of disability devices to be increased.



In April 2024 Karen and Darren Peart kindly ran the Brighton 10k to raise funds for the work of the Trust. As Karen reported:

*"In blustery conditions on the south coast, 3000 runners set off between 8:45am and 9am for a linear run along the seafront with a wee excursion via Brighton Pavilion and the pavement and cafes along St James Street. Steel bands accompanied us to keep the spirits up and the legs pumping. My*

*watch told me that I was in for taking two to three minutes off my previous 10k run in Milton Keynes back in 2021 if I could keep up the pace. I was spurred on by Darren being at the 9K stage (and at the finish) shouting encouragement. Thank you to all for donating and supporting this excellent cause. I have really enjoyed the training and am delighted to have achieved this fitness goal".*

We are very grateful for Karen and Darren's support which raised nearly £1,300. A tremendous sum.

The Trust's calendar was once again a hit with our members and supporters. The 2024 calendar raised £1,700 net of print costs. The cost of packing and posting the calendars was kindly paid for by Susan Walker, one of our trustees. Thank you to Susan and all who purchased one of the calendars. Look out for the 2025 calendar, which is now on sale.

## ***Finance***

The financial result for the Trust shows an overall income of £123,734 (2023: £56,766) and, after deducting administrative expenses of £3,982 (2023: £5,349) and charitable expenditure of £49,182 (2023: £49,167), a net surplus of income over expenditure of £70,570 (2023: £2,250).

### ***Legacies and In Memoriam donations***

During the year the Trust received £69,039 from the estates of three long-term supporters; one of whom for a number of years served as a trustee of the Trust. It is highly unusual, but very much welcomed, for three legacies to be received in a year.

A total of £2,104 was received in memory of five long standing members including Roger Thompson. Roger for many years was one of our trustees and oversaw the Trust's footballs and netballs project.

### ***Donations***

Donors can request that their donation be allocated to a specific designated 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 £25,317, £4,595 and £3,395 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. As a result of the legacy donations cash reserves at 30<sup>th</sup> June 2024 were £119,863. As this has been an exceptional year fund wise the trustees have undertaken a review to ensure that an uplift in grant funding can be sustained over the next three years and will meet the increased needs of the projects we support. As a result the Trust will be adopting a layered approach to its grant funding over the next few years. Besides an uplift in core funding we will be topping up core funding with one-off grants for additional desks, sanitary products, and to help with the inflationary cost of providing school meals.

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

Management and administration expenditure of £3,982 represents 47% of our membership subscription income. This sum includes the cost of printing the calendar and the costs incurred with the website and IT support. 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.



## The Zambia Society Trust

### Income and Expenditure account for the year ended 30 June 2024

	Notes	Unrestricted Funds £	Designated Funds £	Restricted Funds £	Total 2024 £	Total 2023 £
<b>Incoming Resources</b>						
Subscriptions		8,318			8,318	8,353
Donations - General Funds		96,460			96,460	27,240
ZST Merchandise		2,655			2,655	3,198
Contributions to Meetings		237			237	884
Inland Revenue Tax Refunds		5,318			5,318	7,809
<b>Investment Funds &amp; Deposits</b>						
Income from Investments				1,927	1,927	2,035
Interest on COIF Deposit Account		829			829	519
<b>Specific Donations</b>						
Orphan Fund			400		400	-
APTERTS Christmas Appeal			4,195		4,195	-
Education Fund				2,945	2,945	5,370
Joy Goodacre Fund				450	450	240
Shingwa School					-	1,118
<b>Total Incoming Resources</b>		<b>113,817</b>	<b>4,595</b>	<b>5,322</b>	<b>123,734</b>	<b>56,766</b>
<b>Resources Expended</b>						
<i>Charitable Expenditure</i>						
Grants to Individuals	4			19,500	19,500	25,500
Grants to Projects	5		13,500		13,500	13,000
Grant to APTERTS	5	2,005	4,195		6,200	2,000
Grant to Growing Communities	5		5,000		5,000	6,500
Grants to Shingwa School	5		2,856		2,856	-
Football & Netballs Fund	5		2,000		2,000	2,000
Bank charges		126			126	167
<i>Management &amp; Administration</i>						
Sundry expenses		799			799	861
ZST Merchandise		875			875	960
Newsletters & Annual Report		1,204			1,204	2,080
Website and IT support		1,104			1,104	1,004
London Marathon fee					-	444
<b>Total Resources Expended</b>		<b>6,113</b>	<b>27,551</b>	<b>19,500</b>	<b>53,164</b>	<b>54,516</b>
Net Incoming/ (Outgoing) Resources		107,704	(22,956)	(14,178)	70,570	2,250
Fund balances brought forward at 1 July 2023		43,308	2,856	82,912	129,076	126,962
(Decrease)/increase in investment unit values				3,860	3,860	(136)
Transfers from Unrestricted Funds		(35,020)	20,500	14,520	-	-
<b>Fund Balance as at 30 June 2024</b>		<b>115,992</b>	<b>400</b>	<b>87,114</b>	<b>203,506</b>	<b>129,076</b>

## The Zambia Society Trust

### Balance Sheet as at 30 June 2024

	Notes	2024 £	2023 £
Cash at bank			
NatWest Current Account		31,700	33,887
COIF Deposit Funds	6	88,163	15,407
		<b>119,863</b>	<b>49,294</b>
Investments			
Ridge Hobson Fund	7	46,412	44,270
Joy Goodacre Fund	7	14,191	13,536
Education Fund	7	23,040	21,976
		<b>83,643</b>	<b>79,782</b>
<b>Net current assets</b>		<b>203,506</b>	<b>129,076</b>
Represented by:			
Restricted Funds			
Ridge Hobson Fund	7	47,481	45,399
Joy Goodacre Fund	7	16,063	14,976
Education Fund	7	23,570	22,537
		<b>87,114</b>	<b>82,912</b>
Designated Funds			
Football and Netballs Fund		-	-
Growing Communities		-	-
Shingwa School		-	2,856
Orphans Fund		400	-
		<b>400</b>	<b>2,856</b>
Unrestricted Funds		115,992	43,308
<b>Total Funds</b>		<b>203,506</b>	<b>129,076</b>

The Accounts were approved by the Trustees on 16th November 2024

**Tim Legge**  
Chair

**Andrew Rose**  
Treasurer

## The Zambia Society Trust

### Notes to the accounts for the year ended 30 June 2024

#### 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

	2024	2023
Funds transferred to Zambia	£19,500	£25,500
Balance retained in Zambia as at 30 June	ZMW nil	ZMW 29,153

#### 5. GRANTS TO PROJECTS

	2024 £	2023 £
<i>Grants to Orphan Projects</i>		
St Francis, Katete	1,000	3,000
St Lawrence, Home of Hope	4,000	4,000
Mpunde Mission	3,000	3,000
Kwasha Mukwenu	5,500	3,000
	<u>13,500</u>	<u>13,000</u>
<i>Football &amp; Netballs Fund</i>		
Football & Netballs purchased	2,000	2,000
<i>Other Grants</i>		
APTERTS	6,200	2,000
Growing Communities	5,000	6,500
Shingwa School	2,856	-
	<u>29,556</u>	<u>23,500</u>
Bank charges	126	167
	<u>29,682</u>	<u>23,667</u>

## The Zambia Society Trust

### Notes to the accounts for the year ended 30 June 2024 - continued

#### 6. COIF DEPOSIT FUND

	2024 £	2023 £
Represented by:		
Restricted Funds		
Education Fund	530	561
Joy Goodacre Fund	1,872	1,440
Ridge Hobson Fund	1,069	1,129
Designated Funds		
Shingwa School	-	2,856
Orphans Fund	400	-
Unrestricted General Fund	84,292	9,421
	<u>88,163</u>	<u>15,407</u>

#### 7. RESTRICTED FUNDS

	Unit Quantity	Unit price £	Unit value £	Deposits £	Total 2024 £	Total 2023 £
Ridge Hobson Fund	37,648.01	1.2328	46,412	1,069	47,481	45,399
Joy Goodacre Fund	11,511.01	1.2328	14,191	1,872	16,063	14,976
Education Fund	18,688.87	1.2328	23,040	530	23,570	22,537
			<u>83,643</u>	<u>3,471</u>	<u>87,114</u>	<u>82,912</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 2024, which are set out on pages 18 to 21.

### **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

16<sup>th</sup> November 2024



## **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**

Chair: Tim Legge  
Vice Chair: Ken Hamilton  
Treasurer: Andrew Rose  
Secretary: Jenny Healy (resigned 25<sup>th</sup> June 2024)

## **Trustees**

John Barnard  
Anne Fraenkel  
Eileen Hamilton  
Gretta Hudson  
John Hunter (appointed 18<sup>th</sup> November 2023)  
Mathias Mbewe  
David Nicholls  
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