

Trustees' Annual Report for the period	
Period start date	Period end date
01 January 2024	31 December 2024

Section A: Reference and administration details

Branch Name	RAFA Formby Branch		
Other names / number Branch is known by	1242		
Registered charity number (if any)	1078906		
Branch's principal address	23 Balmoral Drive,		
	Churchtown		
	Southport, Merseyside		
	Postcode	PR9 8QB	

Names of the Branch charity trustees who manage the charity (generally known as the Branch Committee)(Please include all trustees for the Branch including custodian trustees in relation to branch property) (Note: Details required are for the period 1 Jan – 31 Dec 24 only)

	Trustee name	Office (if any)	Dates acted if not for whole year
1	David McGregor	Chair	
2	Alan Smith	Secretary	
3	David Williams	Treasurer	
4	Vice Chair	Les Meadows	
5			
6			
7			
8			
9			
10			

Section B: Structure, governance and management

Description of the branch's trusts

Type of governing document (e.g. trust deed, constitution)	Royal Charter, Rules, Byelaws, Area and Branch Regulations of the Royal Air Forces Association.
How the Branch charity is constituted (e.g. trust, association, company)	Unincorporated association
Trustee selection methods (e.g. appointed by, elected by)	Elected by the branch membership

Additional governance issues (Optional information)

<p>You may choose to include additional information, where relevant, about:</p> <p>Policies and procedures adopted for the induction and training of trustees;</p> <p>The branch's organisational structure and any wider network with which the charity works.</p> <p>Relationship with any related parties (including branch club).</p> <p>Trustees' consideration of major risks and the system and procedures to manage them.</p>	<div style="background-color: black; color: white; padding: 5px;">The Charity's Organisational Structure</div> <p>The charity is a branch of the Royal Air Forces Association which is a Royal Charter body and registered as a charity in England and Wales under number 226686 and in Scotland under SC037673 ("the Association"). The Association has many branches all of which share the same charitable object as the Association and are subject to the same constitution.</p> <div style="background-color: black; color: white; padding: 5px;">Trustee Induction & Training <i>(Please insert any induction training or training courses completed by Trustees)</i></div> <p>N/A</p> <div style="background-color: black; color: white; padding: 5px;">Related Party Relationships <i>(e.g. Club if operated)</i></div> <p>N/A</p> <div style="background-color: black; color: white; padding: 5px;">Risk Management <i>(include details of any Risk Management documents held)</i></div> <p>N/A</p>
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Section C: Objectives and Activities

Summary of the objects of the branch set out in its governing document	To promote, through the comradeship engendered by its members, the welfare by charitable means of all serving and former members of Her Majesty's Air Forces, their spouses and dependents, together with the widows and widowers and dependents of those who died whilst serving or subsequently.
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Section D: Achievements and performance in 2024

Summary of the main achievements of the branch during the year

Chair Report

This past year has been one of reflection and growth. Sadly we have had to say goodbye to several cherished members of our RAFA family but also had the pleasure of welcoming new faces to the Branch.

Investments have performed exceptionally well and Wings appeal continues to surpass expectations thanks to the work of June Sefton, wings sec. The commitment to young aviators has continued, now supporting seven Air Cadet squadrons with financing the running of squadron vehicles, helping with sports kit, supply of flight simulation equipment and supporting visits to Europe in the run up to VE and VJ day. RAFA Formby Branch has personalised their relationship by presenting awards for achievements of Cadets ie best cadet. There is also a sponsorship of a floral Roundel dedicated to RAFA Formby Branch all these helping hands are on going and achieve their goal in promoting RAFA and future members of the RAF. In addition there has been support for RAFA Rothbury House and the RAF Benevolent Fund

The support also extends to Merseywing Air Cadets HQ at RAF Woodvale and support to CCF RAF sections school based. Members of the committee actively attend the civilian committees of Crosby and Southport Air Cadets.

RAFA Formby Branch will commemorate the 80th anniversary of VE and VJ days alongside the other services. These historic milestones provide a poignant opportunity to reflect on the bravery and sacrifice of those who served.

Treasurer Report

The Treasure reported on investments achieving their optimum interest and balancing the annual account as attached.

The Treasure reinforced the Annual statement of reserve policy from guidance published by the Charity Commission and RAFA finance. The trustees have agreed to continue to keep an average of estimated 2 years expenditure (£20k to £25k) as a reserve in general funds. It is the trustees expectation unless unforeseen circumstances occur that the charity income which arises almost entirely from investments is likely to exceed this level by year end. In such event it is the trustees intention that all excess funds will be reinvested for the future benefit of the charity.

<p>Summary of the main achievements of the branch during the year (cont)</p>	<p>Branch Welfare Officer Report</p> <p>Welfare visits continue to be an important part of the branch commitment to the local geographical area despite the resignation of 80 yr old from being the resident HWO, however continues to act locally as welfare support.</p>
	<p>Fundraising Report <i>(please insert details of the Branch Fundraising activities i.e. Wings Appeal events)</i></p> <p>Wings appeal continues to flourish, in regular Supermarket collection also inviting the Air Cadets squadrons that are supported by the branch to contribute to collect in their areas. During wings week our presence is felt in Formby village and Southport Botanical Gardens where the new RAFA gazebo is utilised to assist our efforts. Formby Branch members assist at the famous Southport Air Show.</p>
	<p>Membership Engagement Report <i>(please insert details of the Branch Membership Engagement (newsletters, social media etc.)</i></p> <p>The secretary publishes a monthly communication and diary of future events with the agenda for meetings held on the second Tuesday in the month at the Officers, Mess RAF Woodvale at 1430hrs</p>

Summary of
the main
achievements
of the branch
during the year
(cont)

Wellbeing / Social Report *(please insert details of the Branch Wellbeing and Social events/activities)*

The Branch usually have an outing in the early part of the year 2024 was to RAF Museum Cosford enjoyed by the pensioners and Veterans in our membership. Later in the year there is a branch gathering before Christmas. In the Southport there are several gathering points for Veterans ie. The RBL Hub open daily Saturday breakfast club and a Veterans gathering Monthly. Southport Armed Forces Day was a joint commitment with SSAFA and RAFA for the past few years but has now been taken over by RBL and Local Council

Commemoration Report *(please insert details of the Branch Commemoration events/activities (Remembrance, Standard Bearers Attendance at Funerals etc.)*

We have lost a number of WW II Veterans during the year one Frederick Horn was aged 102 The branch has participated in most of the funerals and provided Standard Bearer support along with RBL when required. Trevor Wilkins RAFA member was the most recent and his widow Susan h is now a member of the branch.

Community Engagement Report *(please insert details of the Branch Community Engagement activities (other groups you connect with, joint events such as Veterans Breakfasts)*

Covered earlier

Section E: Financial Review

Statement on Branch Expenditure*(How has branch expenditure supported the key objectives of the branch)*

The Treasure reported on investments achieving their optimum interest and balancing the annual account as attached.

Statement on Branch's Reserve Policy *(Branch Regulations stipulate that any Branch with total assets amounting to more than £5,000 should have a reserves policy and any Branch with assets over £10,000 should consider transferring excess funds across to the Branch Deposit Fund held at Association HQ. A template reserves policy can be found on the Branch Portal)*

The Treasure reinforced the Annual statement of reserve policy from guidance published by the Charity Commission and RAFA finance. The trustees have agreed to continue to keep an average of estimated 2 years expenditure (£20k to £25k) as a reserve in general funds.

Statement on Branch's Investment Policy*(Please include a statement on Branch investments and holdings and how these are managed (if applicable))*

It is the trustees expectation unless unforeseen circumstances occur that the charity income which arises almost entirely from investments is likely to exceed this level by year end. In such event it is the trustees intention that all excess funds will be reinvested for the future benefit of the charity.

Section F: Declaration

We confirm that trustees have had regard to the guidance issued by the Charity Commission on public benefit

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the branch's trustees

We confirm that trustees have had regard to the guidance issued by the relevant Charity Regulator on public benefit.

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the branch's trustees

Signature

Alan Smith

Full Name

Alan Smith

Position (eg. Chair, Secretary)

Secretary

Date

7th April 2025

The Royal Air Forces Association - Formby Branch

Balance Sheet As At 31st December 2024

	2024		2023	
	£	£	£	£
<u>Fixed Assets</u>				
N/A				
<u>Current Assets</u>				
Debtor (RAFA)		5,644		5,371
Cash at bank - current A/c (23815285)		20,689		21,970
Investment savings A/c Rathbones		1,081,996		1,005,606
Investment savings A/c Rothchild		35,769		33,057
		<u>1,144,098</u>		<u>1,066,004</u>
<u>Less Current Liabilities</u>				
RAFA Conference (unpresented CHQ159)		127		129
Welfare (Xmas unpresented CHQ158)		660		44
Rothbury House				10,000
		<u>787</u>		<u>10,173</u>
 Net Current assets/(Liabilities)		<u><u>1,143,311</u></u>		<u><u>1,055,831</u></u>
Represented By:				
Accumulated Fund				
 Balance as at 31st December 2023		1,055,831		1,017,089
Surplus(Deficit) for the year		8378		-5930
Increase/Decrease in investment Savings A/C (Rathbones £76390 + Rothchild £2712)		79,102		44,672
 Balance As At 31st December 2024		<u><u>1,143,311</u></u>		<u><u>1,055,831</u></u>

The Royal Air Forces Association - Formby Branch

Income and Expenditure Account for year ended 31st December 2024

Community Account 23815285

	2,024		2023	
	£	£	£	£
<u>Income</u>				
Membership rebate	564		511	
Investment interest received	22,660		22,679	
Investment A/C Rathbones	5,644		5,371	
Total income		28,868		28,561
<u>Expenditure</u>				
<u>Donations</u>				
Squadron 1439 (Kit CHQ144)	2,500		957	
Squadron 1128 (Transport CHQ153)	1,000		1,000	
Squadron 2348 (Trans+Trip CHQ141+142)	3,974		2,000	
squadron 611(Transport CHQ140)	2,000			
Squadron 611			4,045	
Squadron 281 (Kit CHQ143)	1,026			
Squadron 1126 (Transport CHQ145)	1,500			
Squadron 1908 (CHQ148)	780			
Trophy Cadet Prizes (CHQ136+151+154)	496			
Trophy Cadet award scheme			400	
Cadet Trophies			432	
Botanic Roundel (CHQ134+152)	1,100		500	
Lancaster Display Model			1,000	
Merseyside Wing D of E			1,703	
RAFA Big Ride			1,000	
Total Donations	14,376		13,037	
<u>Other Expenses</u>				
Atkinson (CHQ138)	1,500			
Catering (CHQ135+137+157)	572			
Gazebo/Reader(CHQ136+139)	1,990			
Conference (CHQ159+156)	417		364	
Welfare CHQ158+146+147)	1,431		954	
Expenses(CHQ119+120+125)			116	
Wreaths (CHQ155+156)	70		20	
RAFA Rothbury House			10,000	
RAFA Benevolent Fund			10,000	
MISC (CHQ137+149+150)	134			
Total Other Expenses	6,114		21,454	
Total Expenses		20,490		34,491
Surplus(Deficit) for the year		8,378		-5,930



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name

Royal Air Force Association (Formby Branch)

On accounts for the year
ended

31st December 2024

Charity no
(if any)

1078906

Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended DD / MM / YYYY.

Responsibilities and
basis of report

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 (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

* Please delete the words in the brackets if they do not apply.

Signed:

Sally Billington

Date:

9.3.25

Name:

Mrs J S Billington

Relevant professional
qualification(s) or body
(if any):

AAT
CMI

Address:

4 Ward Avenue Formby Merseyside L37 2JD

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

The Royal Air Forces Association - Formby Branch

Notes to the Financial statements

The Financial statements have been prepared in accordance with applicable accounting policies.

I have completed the financial statements of the Royal Air Forces Association Formby branch for the year ended 31st Decmber 2024, which comprises of the Income and Expenditure account, Balance Sheet. The Financial Statements have been prepared from the accounting records and evidence supplied to me.

Mrs J S Billington
4 Ward Avenue
Formby
Merseyside
L37 2JD

9.3.24