



CHARITY COMMISSION  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From 1.1.2021  
To 31.12.2021

Period start date  
Period end date

Charity name: Friends of Monze

Charity registration number: 1154762

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>To prevent or relieve poverty in Monze in Zambia by providing or assisting in the provision of education, training, healthcare projects and all the necessary support designed to enable individuals and community groups to generate a sustainable income and be self-sufficient;</p> <p>To develop the capacity and skills of the people of Monze in Zambia in such a way that they are better able to identify, and help meet, their needs and fulfil their potential.</p>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<p><b><u>Activities for the purpose of education:-</u></b></p> <p>Friends of Monze (FoM) works with our Monze based partners Zambia Women and Girls Foundation (ZaWGF) who assess the school's needs and together we plan projects. Before we begin work on the schools the local community have to prepare "up front materials" of hand moulded and fired bricks, crushed stones and enlist local people to carry water and provide unskilled labour.</p> <p><b><u>Sikabenga School:-</u></b></p> <ul style="list-style-type: none"><li>• We repaired 2 classrooms where the roof blew off in 2018 and the community was unable to raise funds for repair.</li><li>• We provided text books, bookcases and more desks</li></ul> <p><b><u>Mungolo School:-</u></b></p> <ul style="list-style-type: none"><li>• this school is in a remote area, in 2020 we built a school with 3</li></ul>

		<p>classrooms and one teacher's house. Although we transferred funds for a second teacher's house in 2020, the road was impassable during the rainy season so the second house was not actually built until April 2021.</p> <p><b>Luumba-Moonya School:-</b></p> <ul style="list-style-type: none"> <li>• Although the local community started building 2 classrooms, they could not raise enough money to complete the building. FoM agreed what we would put the roof on and finish 2 classrooms.</li> <li>• We then built 3 more classrooms which the community had started.</li> <li>• This is a rural school and had no teacher's house, making it difficult for Government appointed teachers to travel to school each day. The community had started building a teachers house in this rural area but again could not afford to complete it. FoM ensured the house was finished and a teacher immediately moved to live on site.</li> <li>• We provided books, bookcases and desks.</li> </ul> <p><b>Nalutanda School:-</b></p> <ul style="list-style-type: none"> <li>• This is a school for 1,257 children in a rural area. The community had started building classrooms however the foundations were not strong and had to be abandoned. We started again and built 3 classrooms.</li> <li>• We donated textbooks.</li> </ul> <p><b>Ntambo School:-</b></p> <ul style="list-style-type: none"> <li>• We donated text books and bookcases and desks.</li> </ul> <p><b>"Happy Reader" reading scheme:-</b> We purchased this culturally appropriate graded reading scheme to improve the standard of literacy.</p>
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		<p>Books for use in 4 schools were purchased in 2020. Teacher training was delayed by covid-19 restrictions until May 2021. FoM partners in Monze and the Monze Department of Education are monitoring reading attainment in the 4 schools. They report:- <i>"Happy Readers reading Programme has a positive impact in the school as it is helping children learn to read English."</i></p> <p>We raised funds in 2021 which enabled us to provide sets of books for 5 more schools which started using these books in 2022.</p> <p><b>Connecting Classrooms:-</b> this is a project which connects 3 schools in Wales with 3 schools in Monze, so the schools learn about each other's countries. Due to covid travel restrictions teacher's could not carry out exchange visits, contact was by zoom. A donation from Connecting Classroom was used for education and environment projects at the 3 participating school in Monze.</p> <p><b><u>Activities for the purpose of Healthcare:</u></b></p> <p>In Zambia there is one rainy season a year, November to March. Water is essential for good health for drinking, hygiene and gardens. The first activity when we work at a school is always to establish and maintain a water supply.</p> <p><b>Boreholes:-</b> At Ntambo, Namateba and 2 more schools we drilled boreholes fitted with hand pumps. At Nalutanda school we drilled a borehole fitted with an electric pump Bore holes and hand pumps were repaired at Sikabenga school and 9 more schools,</p> <p>Sports equipment and traditional drums for dancing were donated to Ntambo, Sikabenga, Luumba-Moonya and Nalutanda Schools.</p> <p><b>Toilets:-</b> we transferred money in October 2020 to build 4 toilets at remote Mungolo school, however due</p>
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		<p>to rains making the road impassible, the pit latrine toilets could not be built until April 2021.</p> <p><b>Soap to prevent spread of covid:-</b> we provided soap for use in schools</p> <p><b>Water Sanitation and Hygiene (WASH) training:-</b> our partners spent 3 days at Kachindu School and Malimba School teaching WASH and constructing hand washing stations.</p> <p><b>Menstrual Hygiene Management (MHM) training:-</b>MHM training for 1 day given by our partners, and re-usable pads provided at Kachindu, Malimba and Mungolo Schools.</p> <p><b><u>Activities for the purpose of training and Income generation;</u></b>  We taught tree planting and care at <b>Monze Correctional Facility Prison</b>. The inmates were trained so they can propagate and grow trees to generate income when they are released. We also provided a solar powered water pump for watering the trees.</p> <p><b>Building apprentices:-</b>10 young people had theory and practical training in building skills at Luumba-Moonya School  We started training more building apprentices in construction theory, they will do practical training in 2022 at Namateba school.</p> <p><b><u>Activities undertaken to provide nutrition to benefit health and education of children and generate income:-</u></b>  <b>School gardens:-</b> we teach children, teachers and the local community gardening skills, enabling them to grow a variety of food for the children to eat and generate income for the school.</p> <ul style="list-style-type: none"> <li>• Kachindu school:- 5 days garden training</li> <li>• Mungolo school:- 5 days garden training and tools provided</li> <li>• Ntambo school:- 5 days garden training, tools provided, given trees, fence erected to keep animal from eating crops.</li> </ul>
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		<p><b>Tree planting:-</b> 3,005 trees planted at 14 schools and communities. Tree planting, care, and propagation taught at 8 schools.</p> <p><b><u>Activities for the purpose of developing capacity and skills:</u></b></p> <p>Traditional Zambian leaders, who dispense customary law, do not necessarily know the statutory law. This can limit access to justice, particularly for women and girls.</p> <ul style="list-style-type: none"> <li>• Human Rights training provided for teachers and children at Ntambo school. Funds were transferred in 2021 and this project will continue to train traditional leaders and villagers in 2022.</li> <li>• We provided 3 days Human Rights training at Mungolo school. This was the first time men, women, boys and girls had the opportunity to attend Human Rights training and some of the concepts seemed novel. Our partners advised we provide further training.</li> </ul>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	All trustees have understood the guidance.

#### **Additional information (optional)**

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by	Para 1.38	

volunteers		
Other		

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p><u>Achievements in improving education</u></p> <ul style="list-style-type: none"> <li>Children were previously in overcrowded classrooms, sitting on the floor taught by unqualified teachers with only a few out of date books.</li> <li>In 2021 we improved the educational infrastructure in Monze District by building or completing 4 schools to high Government standards. We equipped 4 schools with a large number of Zambian curriculum text books. We provided desks for 3 schools.</li> <li>The Zambia Department of Education cannot deploy qualified teachers in rural schools unless there is adequate accommodation. In 2021 we provided 2 teacher houses to ensure school children can be taught by qualified Government teachers.</li> </ul> <p><u>Achievements to improve health</u></p> <ul style="list-style-type: none"> <li>The rate of neglected tropical diseases (NTD's) including intestinal worms is high in the Monze District of Zambia. These diseases cause chronic ill health. When there is no water supply at school, children have to carry drinking water to school or leave lessons to walk some distance from school to the nearest bore hole. There is no hand washing facility.</li> <li>We drilled bore holes at 4 schools providing hand pumps and an electric powered pump at one school, we also repaired 9 pumps providing water to other school. Schools and local families now have a plentiful clean fresh supply of water for</li> </ul>

		<p>drinking, hygiene and gardening purposes.</p> <ul style="list-style-type: none"> <li>• We provided WASH hygiene training, soap and toilets to reduce the spread of NTD's and Covid. By providing soap for hand-washing at schools, communities benefit from improved health by reducing the spread of Covid-19 and other diseases</li> <li>• Girls without menstrual hygiene knowledge and materials miss lessons during menstruation so fall behind and drop out of education. We provided training and materials for girls at 3 remote rural schools so girl are not left behind due to menstruation.</li> </ul> <p><u>Achievement to improve income generation</u></p> <p>A number of the men and women apprentice builders we trained at Luumba-Moonya school have gone on to gain employment.</p> <p><u>Achievements to improve income generation carried on from previous years:-</u></p> <ul style="list-style-type: none"> <li>• The people we trained in 2019 as permaculture trainers are now teaching other subsistence farmers.</li> <li>• Women at 3 Churches continued to make menstrual hygiene pads for school girls using sewing machines we previously donated.</li> <li>• We provided soap making equipment to Mwiinga-Malimvwa and Mungolo communities to enable them to generate income.</li> </ul> <p><u>Achievements to improve health, education, nutrition and generate income</u></p> <ul style="list-style-type: none"> <li>• We have now established 10 school permaculture gardens and 1 community support garden. Children spend part of the school day in the classroom and part in the garden learning skills which will enable them to grow food and generate an</li> </ul>
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		<p>income in the future.</p> <ul style="list-style-type: none"> <li>• They learned to harvest seeds for sharing, grow a variety of drought resistant indigenous crops, prepare compost and bokashi soil enhancer, use companion planting and natural pesticide, to prevent soil erosion, and water harvesting, so they can produce food and combat climate change</li> <li>• The school gardens are run by a committee of local farmers who also benefit from attend training at the schools and learning new skills. Garden produce is used to feed the children and also to raise funds to buy school equipment.</li> <li>• Tree planning is an ongoing project, at schools, homesteads and Monze Correctional Facility Prison. We donate trees which provide fruit, nuts, medicine and nitrogen fixing. We teach how to care for and propagate trees, also the importance of trees in protecting the environment and mitigate the impact of climate change.</li> </ul> <p><u>Achievements to develop capacity and skills</u></p> <p>Teachers and children who attended human rights training at Ntambo school have formed a "Para-legal Kids Club" for children to teach their peers about their human rights and help victims of abuse. This is part of a wider community project.</p> <p>Our partners reported that the 3 days Human Rights training at Mungolo was very welcome however it was felt that more training would be necessary.</p>
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### **Additional information (optional)**

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities	Para 1.41	<b>Fundraising activities were curtailed due to restrictions to prevent the spread of corona virus.</b>



against objectives set		
Investment performance against objectives	Para 1.41	
Other		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Funds available to complete current projects
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<p>Friends of Monze modus operandum is to collect donations from the UK and elsewhere and channel these to our partner charity in Zambia, Zambia Women and Girls Foundation (ZaWGF), who project manage the projects we support in Zambia. These include the building and/or repair of school buildings, supply of teaching materials, and the funding of ancillary activities, such as training, permaculture gardening, and tree planting.</p> <p>We estimate the costs of the projects that we undertake, and ensure that there is funding in place for them via the donations, before we agree with ZaWGF that they can proceed. We have next to no expenses or recurrent costs in the UK, and we do not take out loans.</p> <p>Our only recurrent expenditure is some financial support for the running costs of ZaWGF, including appreciation for ZaWGF Project Manager and Treasurer, which ensures the ongoing co-operation between FoM and ZaWGF.</p> <p>The Board judges that a reasonable level of reserves is to ensure that there is always at least three months funds in our account to continue this support for ZaWGF.</p> <p>Grants and donations received for named projects are held as restricted funds, and used only for these projects. These restricted funds are excluded from the unrestricted reserves above.</p>
Amount of reserves held	Para 1.22	<b>£600</b>
Reasons for holding zero reserves	Para 1.22	<b>N/A</b>
Details of fund materially in deficit	Para 1.24	<b>None</b>
Explanation of any	Para 1.23	<b>None</b>

uncertainties about the charity continuing as a going concern		
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### **Additional information (optional)**

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	Private philanthropy. Trusts and Foundations On-line fundraising
Investment policy and objectives including any social investment policy adopted	Para 1.46	<b>N/A</b>
A description of the principal risks facing the charity	Para 1.46	<p>1. Misuse of FoM funds by ZaWGF, this risk has been reviewed by trustees and deemed unavoidable. The risk is managed by:-</p> <ul style="list-style-type: none"> <li>• Sharing online records, spreadsheets</li> <li>• annual visits by trustees are preferred to monitor and plan projects however this was not possible in 2021 so meetings have been held over the internet.</li> <li>• weekly reports and photographs from ZaWGF, building contractor and teachers</li> </ul> <p>2. Fluctuation in currency exchange rates. This risk is deemed unavoidable and managed by raising funds for contingencies.</p>
Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Charitable Incorporated Organisation whose only voting members are its' charity trustees
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Charitable Incorporated Organisation
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	New trustees are selected from interested supporters and appointed by existing trustees

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	Friends of Monze has policies for new trustees which include eligibility, appointment, conflict of interest, and induction to the role.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	FoM officers are chair, vice-chair, secretary and treasurer. Trustees meet in person or by zoom every 2 months. We also communicate and can make decisions by email. The trustees make decisions on raising and spending funds by agreement made by the majority of trustees.
Relationship with any related parties	Para 1.51	FoM works with a partner organisation Zambia Women and Girls Foundation (ZaWGF) which is an NGO registered in Zambia. Projects and activities are planned, carried out, monitored and reported on in collaboration with ZaWGF. We have worked with the same partners since FoM started in 2012.
Other		

## Reference and Administrative details

Charity name	Friends of Monze
Other name the charity uses	
Registered charity	1154762

number	
Charity's principal address	Quaker Meeting house 87 Park Street Bridgend CF31 4AZ

## Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Peter Anfield Davies			
2	Lynne Rees			
3	Gill Nelson	Secretary		
4	Paul Green	Vice Chair		
5	Kevin Murnan			
6	Alistair Nelson	Treasurer		
7	Belinda Green			
8	Virginia Jane Deana Owen	Chair		
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## Corporate trustees - names of the directors at the date the report was approved

Director name		

## Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	


## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/A
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

#### Name of chief executive or names of senior staff members (Optional information)

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### Exemptions from disclosure

Reason for non-disclosure of key personnel details

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### Other optional information

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## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

	
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Full name(s)

Virginia Jane Deana Owen	
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Position (eg  
Secretary, Chair, etc)

Chair	
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Date

10 <sup>th</sup> June 2022
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FRIENDS OF MONZE  
ACCOUNTS FOR THE YEAR ENDED 31st DECEMBER 2021  
INCOME & EXPENDITURE ACCOUNT

2021

2020

General Fund Designated Fun Restricted Funds

		£	£	£	£	£
Income	note 2					
	Donations	5,635	95,000	7,800	108,435	90,038
	Grants	7,000 -		2,140	9,140	5,000
	Interest	-	-	-	0	0
	Gift Aid	13,608 -		-	13,608	6,308
	Sales	334 -	-		334	526
	<b>Total Income</b>	<b>26,577</b>	<b>95,000</b>	<b>9,940</b>	<b>131,517</b>	<b>101,872</b>
Expenditure	notes 3,4					
	Grants To Monze Small Projects	0 -	-		0	450
	School construction	0	90,306	1,500	91,806	76,576
	Food and Seed aid	0 -	-		0	6,219
	Bore Holes	10,954			10,954	
	Water and Hygiene	1,015		200	1,215	
	Human Rights Training	436		2,140	2,576	
	Tree Planting	19,001			19,001	0
	Gardens/Permaculture	323 -	-		323	2,747
	Teaching Materials	4,086 -		5,000	9,086	11,374
	Other Expenses	3,887 -	-		3,887	2,487
	Bank Charges	250 -	-		250	275
	<b>Total Expenditure</b>	<b>39,952</b>	<b>90,306</b>	<b>8,840</b>	<b>139,098</b>	<b>100,128</b>
	Excess Of Income For The Year	(13,375)	4,694	1,100	(7,581)	1,744

Alistair H. Nelson

G. Thompson

Reserves Brought Forward From 2020	8,794 -	1,600	10,394	8,649
Transfers between Funds	-	-	-	-
<b>Reserves Being Excess Of Income Over Expenditure</b>	<b>4,581</b>	<b>4,694</b>	<b>2,813</b>	<b>10,393</b>

This Is Represented By:

Net Assets

Bank Accounts:

Earclays Current Account

2,804 10,384

Earclays Saver Account

9 9

2,813 10,393

Less Accruals

0 0

**Total Assets**

**2,813 10,393**

I certify that the above accounts show a true and fair view of the financial position of the Friends of Monze, for the year ended 31st December 2021.

Treasurer

Auditor

A.H. Nelson

P Thompson

date 6/6/22

*Alistair H. Nelson*

*P. Thompson*

## **FRIENDS OF MONZE**

### **YEAR ENDED 31<sup>st</sup> DECEMBER 2021**

#### **NOTES TO THE ACCOUNTS**

2. The aims of Friends of Monze are to raise funds to work through strong partnerships with local groups in Monze, Zambia, to develop projects which focus on agriculture and education, particularly with our major partners Zambia Women and Girls Foundation (ZaWGF). This is the ninth year of operation of the charity, during which funds of £131,517 (2020 £101,872) have been raised, and £139,096 (2020 £100,128) spent, most of which has been distributed to various projects in Monze, giving a deficit of income over expenditure for the year of £7,580 (2020 surplus of £1,744). This is a wonderful effort in a year blighted by the Corona virus pandemic, and is due almost entirely to the unceasing work and commitment of the founder and Chair, Deana Owen, and to the generosity of those who have made donations.
3. £133,846 (2020 £99,687) has been transferred to the account in Monze of ZaWGF during the year. Expenditure includes major projects such as the completion of the building of Mungolo Schools, the building of schools at Sikabenga, LumbaMoonga, the start of school building at Nalutanda and Namateba, and the extension of a school at Ntambo. Ancillary projects connected with school establishment are the drilling of Bore Holes for water, erection of Solar Panels for electricity, permaculture training and the provision of teaching materials. Regular schedules of receipts and expenditure, and supporting documentation are received from ZaWGF. Also £5000 was transferred to the Account of C O Beirne for the purchase of Reading books for several schools – the books are sourced from Zimbabwe.
4. £19,001 was donated to plant trees. 14 schools and the Monze Correctional Facility prison have been given more than 3,000 useful trees. The schools and communities have learned the importance of trees to the environment, their care and propagation. This project includes providing water, we drilled 4 boreholes and repaired 9 more giving schools and communities access to clean water. £2,576 was transferred for human rights training. Traditional Zambian leaders who dispense customary law, do not necessarily know the statutory law. This can limit access to justice, particularly for women and girls. Our partners ZaWGF have special interest and expertise in human rights training. The training at Ntambo and Mungolo is ongoing.