



CHARITY COMMISSION
FOR ENGLAND AND WALES

Friends of the Harvard Club of the United Kingdom

1170228

Receipts and payments accounts

CC16a

For the period
from

01/01/2023

To

31/12/2023

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Centennial Fund Donations	6,250	-	-	6,250	6,250
Harvard Prize Book Donations	2,451	-	-	2,451	2,249
Public Service Donations	200	-	-	200	340
Gift Aid	-	-	-	-	-
Outreach Donations	150	-	-	150	100
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	9,051	-	-	9,051	8,939
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	9,051	-	-	9,051	8,939
A3 Payments					
Outreach Expenses	16,914	-	-	16,914	5,415
Public Service Expenses	-	-	-	-	-
Harvard Prize Book Expenses	3,700	-	-	3,700	2,987
Donation	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	20,614	-	-	20,614	8,402
A4 Asset and investment purchases, (see table)					
Cazenove	20,000	-	-	20,000	-
CCLA	10,000	-	-	10,000	-
Sub total	30,000	-	-	30,000	-
Total payments	50,614	-	-	50,614	8,402
Net of receipts/(payments)	- 41,562	-	-	- 41,562	537
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	111,766	-	-	111,766	111,229
Cash funds this year end	70,204	-	-	70,204	111,766

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Co-operative Bank Account	70,204	-	-
		-	-	-
		-	-	-
		-	-	-
	Total cash funds	70,204	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

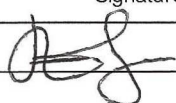
	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	Cazenove	Sustainable Multi-Asset Fund	-	20,953
	CCLA	Ethical Investment Fund	-	10,354
			-	-
			-	-
			-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
	JORDAN EVANS	16/10/24



Trustees' Annual Report for the period

Period start date		Period end date	
01	01	31	12
2023		2023	
From		To	

Section A Reference and administration details

Charity name	Friends of the Harvard Club of the United Kingdom		
Other names charity is known by	Friends of HCUK		
Registered charity number (if any)	1170228		
Charity's principal address	ARDEN		
	WANSTROW		
	SOMERSET		
Postcode	BA4 4SU		

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	Caroline Costin	Trustee		
2	Jordan Evans	Trustee/Treasurer		
3	Martha Genieser	Trustee		
4	Stuart Gordon	Trustee		
5	Ali Khanbhai	Trustee	01/01/23-01/05/23	
6	Maria Sofia Kourti	Trustee	02/06/23-31/12/23	
7	Vicky Leung	Trustee/Chairperson		
8	Fiona Lin	Trustee/Secretary		
9	Victoria Sanders	Trustee		
10	Daphne Siniscalco	Trustee		
11	Yuko Thomas	Trustee		
12	Max Wong	Trustee	02/06/23-31/12/23	
13				
14				
15				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organisation (CIO)
Trustee selection methods (eg. appointed by, elected by)	Appointed by existing trustees

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

To advance education for the public benefit in particular but not exclusively by promoting higher education for students in the UK who are considering attending university, including university in the United States.

To further the educational and other charitable work of Harvard University (that is charitable under English law).

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

All trustees have read the guidance on public benefit issued by the Charity Commission and have considered this guidance when exercising any powers or duties to which the guidance was relevant.

During the seventh year of Friends of HCUK's operations, we were able to achieve our objectives through the following activities:

- Distributing the Harvard Prize Book to 195 UK secondary schools for them to award to a student in the penultimate year
- Conducting sixteen school presentations to broaden awareness of US University education
- Funding attendance to the Fulbright Commission's USA College Day
- Holding two 'study skills' workshops for students wanting to apply to US universities in the future
- Continuing to fund the "Study in the USA" newsletter which reaches over 2,200 students, teachers & parents
- Subsidising a trip for eight high-performing UK students from low-income backgrounds to visit four US universities which were on their application shortlist.
- Organising volunteer activities to feed the homeless

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

The funds raised by Friends of HCUK in previous years continue to allow it to pursue its goal of promoting the option of a U.S.-based university education for students in the United Kingdom for at least the next 10 years.

The key achievements of Friends of HCUK over the past year were as follows:

- Marking the 11th consecutive year of the HCUK Outreach Programme, delivering 19 outreach events over the course of the year
- Distributing the 124th issue of our "Study in the USA" newsletter, which has over 2,200 subscribers
- Expanding the Harvard Prize Book to a further 11 schools
- Subsidising a trip for eight high-performing UK students from low-income backgrounds to visit four US universities which were on their application shortlist.

Section E

Financial review

Brief statement of the charity's policy on reserves

Friends of HCUK's Centennial Fund was raised to fund the charity's operations for at least 10 years. As such, we have intentionally retained substantial reserves to allow us to achieve this goal.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Section F

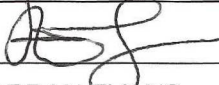
Other optional information

Section G

Declaration

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	JORDAN EVANS	
Position (eg Secretary, Chair, etc)	TREASURER/TRUSTEE	
Date	16/10/2024	