

# MALMESBURY LEAGUE OF FRIENDS

England & Wales · Charity number 261801

## Details

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**Other names** MALMESBURY HOSPITAL LEAGUE OF FRIENDS

**Status** Registered

**Legal form** Other

**Registered** 1970-11-24

**Register** [View on the Charity Commission register](#)

## Contact

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**Address** The Coach House  
Foxley Road  
Malmesbury  
Wilts  
SN16 0JQ

**Phone** 07891607353

**Email** [thehalseys@btinternet.com](mailto:thehalseys@btinternet.com)

**Website** [mlof.co.uk](http://mlof.co.uk)

## Activities

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**Objects:** TO RELIEVE PATIENTS AND FORMER PATIENTS OF LOCAL HOSPITALS, CARE HOMES, CARE CENTRES, OTHER WELFARE AGENCIES AND SOCIETIES AND OTHER INVALIDS IN THE COMMUNITY OF THE TOWN OF MALMESBURY WHO ARE SICK, CONVALESCENT, DISABLED, HANDICAPPED, INFIRM OR IN NEED OF FINANCIAL ASSISTANCE.

**Activities:** To supplement the services provided by the local and national welfare agencies in providing for the health and comfort of the patients and other invalids in the community, by providing facilities, buildings and equipment which may be required for the treatment of members of the local community.

## Classification

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- **How:** Makes Grants To Organisations, Provides Human Resources, Acts As An Umbrella Or Resource Body
- **What:** The Advancement Of Health Or Saving Of Lives, Disability
- **Who:** People With Disabilities, The General Public/mankind

## Geography

- **Area of benefit:** TOWN OF MALMESBURY AND SURROUNDING RURAL AREAS.
- Wiltshire

## Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£19,141	£86,451	-	-
2023-12-31	£99,463	£67,398	-	-
2022-12-31	£53,031	£90,458	-	-
2021-12-31	£106,360	£97,254	-	-
2020-12-31	£47,364	£71,147	-	-

## Trustees

Name	Role	Appointed
<b>HAYLEY WEBB</b>	Chair	2023-05-14
Ally Buxton		2024-05-15
Charles William Gould		2023-11-14
Claire Louise Jordan		2023-05-09
David Charles Beldon		2026-01-13
Dawn Halsey		2018-03-13
Emily Claire Maas		2026-01-13
Joanne Mary Forss		2026-03-10
KEITH MASLIN		2016-09-11
Philippa Mary Jones		2022-07-12
SONIA LA FONTAINE		

**MALMESBURY LEAGUE OF FRIENDS**

England & Wales - Charity number 261801

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# Accounts

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**MALMESBURY LEAGUE OF FRIENDS**

**Registered Charity No 261801**

**ANNUAL REPORT AND ACCOUNTS**

**Year Ending 31 December 2023**

## MALMESBURY LEAGUE OF FRIENDS

### Annual Report for the year ended 31 December 2023

The Malmesbury League of Friends is a charity registered with the Charity Commissioners (Number 261801).

The Governing Instrument is the present Constitution, which complies with the requirements of the Charity Commissioners and was adopted on 17 May 2007.

The registered address is that of the Treasurer: Mrs Dawn Halsey, The Coach House, Foxley Road, Malmesbury SN16 0JQ.

The charity trustees during the year to 31 December 2023 were as follows:

Mr D Hide	Chairman	Re-elected 3 May 2022
Ms H Webb	Vice Chair	Elected 9 May 2023
Mr D Hide	Hon Secretary	Elected 3 May 2022
Mrs D Halsey	Hon Treasurer	Elected 9 May 2023
Mr D Rutherford	Hon Treasurer	Resigned 9 May 2023
Mrs S La Fontaine	Minutes Secretary	Re-elected 3 May 2022
Mr K Maslin	Applications Co-Ordinator	Re-elected 3 May 2022
Mrs P Jones	Trustee	Elected 12 July 2022
Mrs A Lewis	Trustee	Re-elected 9 May 2023
Mr H Walmsley	Trustee	Resigned 9 May 2023
Mr P Hewson	Trustee	Resigned 11 July 2023
Mrs Claire Jordan	Trustee	Elected 9 May 2023
Mr Charles Gould	Trustee	Elected 7 November 2023
Mrs Eve Miller	Trustee	Elected 9 May 2023

The object of the charity is to relieve patients and former patients of local hospitals, care homes, care centres, other welfare agencies, societies and other residents in the community who are sick, convalescent, disabled, infirm or in need of financial assistance. New trustees are appointed on a renewable term of three years.

The trustees' policy is generally to make grants to the NHS Trusts for the provision of extra comforts, initiatives and extra facilities for use in the local area by patients served by the above agencies. The charity's income is made up of members' subscriptions, donations, legacies and interest from investments. Major fundraising has only ever been undertaken, in the past, for large building projects.

### Finances

Accounts for this year have been prepared in the usual format. Income, in the main, has been from investments. A list of donations is attached to this report.

# MALMESBURY LEAGUE OF FRIENDS

## CHAIRMAN'S ANNUAL REPORT. JANUARY – DECEMBER 2023

This has been a year of consolidation and steady progress for the Malmesbury League of Friends (MLOF). We were able to hold our six bi-monthly meetings in our usual meeting place, the top floor of the MPCC, for which we are very grateful. We made donations totalling over £67,000 during the year, a full list of which is in the Treasurer's report.

### Investment Portfolio

The MLOF Investment Portfolio enables us to make donations to a range of organisations and needy individuals. It is absolutely key to achieving our objectives. Under David Rutherford's outstanding stewardship, it provided a steady and healthy return.

On his retirement at the AGM in May, Dawn Halsey was elected his successor. She and the chairman both felt that, with assets over £1.5 million, this should be under professional fund management. Indeed, it is a requirement of the Charities Commission. Accordingly, in July, we interviewed two highly regarded and successful fund management companies: Quilter Cheviot and Charles Stanley. After a very thorough review of their proposals, Charles Stanley was appointed.

Their Investment Manager, Shelley James, presented her proposals at our September meeting, which were unanimously accepted. For the remainder of the year, and into 2024, the MLOF portfolio has been steadily transferred into CS' care. We are confident that this will enable us to continue making much needed and valued donations.

### Trustees

At the AGM in May, David Rutherford retired as our long standing treasurer after many years outstanding service and was succeeded by Dawn Halsey. I pay tribute to him and also to Dawn for her work in making the transition of the portfolio to Charles Stanley so seamless.

During the year, Paul Hewson resigned, and Claire Jordan, Eve Miller and Chas Gould were elected, all of whom are very welcome and are making a valued contribution to the team. Eve Miller was particularly welcome to represent the Tolsey Surgery in Sherston

### MPCC/Athelstan House/Tolsey, Sherston

We continue to enjoy excellent relations with the Malmesbury Primary Care Centre (MPCC), Athelstan House (AH), and the Tolsey surgery in Sherston, all of which we have supported during the year. Donations for items of medical equipment to the MPCC totalled over £5,300, £4,300 to AH and £1,500 to the Tolsey surgery.

The MPCC Practice Manager, Charlotte Gorman, has been hugely helpful in enabling us to hold our meetings in their conference room. The new manager at AH, Dean Palfrey, approached us during the year for support in developing their Heart of the Home project, which is ongoing.

Plans for a new surgery in Sherston, which MLOF would support, continue, but progress is glacial.

### Defibrillators

During the year, we funded, at £1,500 each, four more defibrillators:

- Milbourne
- Garsdon
- Malmesbury Tennis Club
- Hilditch – 50% funding: £750
- Alvan Blanch – 50% funding - £750

This brings the total number in the local area paid, or partly paid, by MLOF, to 25. Further installations are planned for four more in Malmesbury itself during 2024, working with local expert Ray Sanderson.

#### **Dorothy House**

We continue to enjoy close relations with Dorothy House Hospice Care (DH) in Winsley, near Bradford-on-Avon. DH launched a major £500,000 Always Here fund raising campaign in November 2023, which was hugely successful. MLOF contributed to this with a donation of £30,000. As a result, the chairman and vice chair were invited to a major event in September attended by the Princess Royal, to whom the chairman was presented.

#### **Wiltshire Air Ambulance (WAA)**

In 2023, we donated a further £10,000 to WAA, which will be formally handed over early in 2024.

#### **Brighter Futures – GWH, Swindon**

We continue to maintain close contact with Brighter Futures, the fund-raising arm of Great Western Hospital (GWH) in Swindon. During the year, we donated £10,000 towards a mobile X-Ray machine for use in their new Emergency Department. Our long-standing contact there, Jane Leighton, departed and has been succeeded by Tina Outlaw.

#### **Local organisations**

We continue to support local organisations in need and, during the year, we have helped the following, among others (see full list of donations):

- Cartmell Minibus - £6,000
- Town Hall Cinema Projector - £5,000
- Doorway, Chippenham - £3,240
- HEALS – Summer Activity - £1,000 & Christmas Appeal £1,000
- Jackdaw community magazine- £750
- Stay Safe Initiative - £ 365

#### **Needy Individuals**

We remain committed to helping needy individuals and, during the year we helped:

- A Malmesbury resident – repairs to her car to enable her to start work at GWH as a mental health nurse

### **Malmesbury Area Community Trust (MACT)**

MACT is another, well endowed, local charity with whom we continue to work closely. During the year, we shared requests from the Stay Safe Initiative & the Digital Empowment Programme for Malmesbury Senior & Primary Schools.

### **Publicity/Communications**

I continue to believe that we should maintain a strong local profile. We always publicise our donations, subject to individual circumstances, on social media, local press and radio. Through the excellent work by Keith Maslin, we have ensured that the local community, via social media, are aware of the important work we undertake.

### **Conclusion**

All the donations made during the year have only been possible from the income derived from a substantial investment portfolio. This is largely due to the magnificent efforts of our long standing treasurer, David Rutherford who, as I have already mentioned, retired at the AGM. I pay tribute to him for his tireless work over very many years. His successor, Dawn Halsey, has already undertaken a huge workload with the transfer of the fund to Charles Stanley & is doing a fantastic job.

Finally, I thank all our trustees for their support, advice and time, which is much appreciated.

David Hide, Chairman – May 2024

# MALMESBURY LEAGUE OF FRIENDS NO 261801

## Statement of Account for the Year Ending 31 December 2023

<u>Receipts</u>	£	£	<u>Payments</u>	£	£
Subscriptions	225.00		ATTEND Subs	690.00	
Sale of units	50,000.00		Examiner	142.58	
Donations	500.00		Stationery	44.69	
Legacy	69.00		Retirement Gift	53.98	
Interest	<u>48,669.01</u>	99,463.01	AGM Buffet	200.00	
			Malmesbury TC	27.00	
			Trustee Expenses	269.46	
			Website Maint.	<u>16.78</u>	1,444.49
			<u>Donations</u>		
			<u>See Attached List</u>		67,397.53
Add Lloyds Bank as at 31 December 2022		23,107.64	Add Lloyds Bank as at 31 December 2023		53,728.63
Total		<u>122,570.65</u>			<u>122,570.65</u>

### Asset Valuation as at 31 December 2023

COIF Investment Fund	1,196,848.40
Schroders Multi Asset Fund	227,022.85
M&G Optimal Income Fund	<u>62,902.10</u>
	<u>1,486,773.35</u>

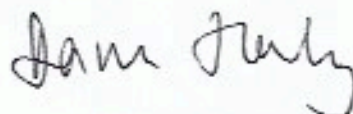
### Total Assets as at 31 December 2023

Lloyds Bank	53,728.63
Investments	1,486,773.35
	<u>1,540,501.98</u>

Examined and found correct with books and vouchers produced



T Brown  
Independent Examiner  
Date 01/05/2024



D Halsey  
Hon Treasurer  
Date 1/5/24

## Malmesbury League of Friends No 261801

### Purchases and Donations 2023

#### Athelstan House

Healthcare Equipment	<u>4,320.00</u>	4,320.00
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#### Malmesbury Primary Care Centre

Malmesbury Medical	1,512.06	
Malmesbury Medical	1,551.60	
Malmesbury Medical (vaccine fridge)	<u>2,299.18</u>	5,362.84

#### Tolsey Surgery

Medical Equipment	<u>1,525.50</u>	1,525.50
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#### Donations

Auto Diagnostics	554.69	
Jackdaw Club	750.00	
Carer Support Wiltshire	1,500.00	
Stay Safe Initiative	365.00	
Alvan Blanch (Defib)	750.00	
Wiltshire Mind	5,000.00	
So4Bed	417.00	
Young Carers	5,000.00	
Malmesbury Tennis Club (Defib)	1,500.00	
Julia's House Hospice	10,000.00	
HEALS	1,000.00	
Projector Appeal	5,000.00	
HEALS	1,000.00	
Hilditch (Defib)	750.00	
Cartmell Minibus	6,000.00	
St Paul's (Defib)	1,500.00	
Lea & Garsdon (Defib)	1,500.00	
Wiltshire Air Ambulance	10,000.00	
Stay Safe Initiative (2)	362.50	
Doorway Wiltshire	<u>3,240.00</u>	<u>56,189.19</u>

#### Total

67,397.53

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF THE MALMESBURY LEAGUE OF FRIENDS

Report on the Accounts of the Trust for the year ended 31 December 2023, which are set out on pages 4 and 5.

#### RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER

As the Charity's Trustees you are responsible for the preparation of the Accounts: You consider that the Audit requirement of Section 43 (2) of the Charity Act 1993 (the Act) does not apply.

It is my responsibility to state, on the basis of procedures specified in the General directions by the Charity Commissioners under Section 43 (7) of the Act, whether particular matters have come to my attention.

#### BASIS OF REPORT

My examination was carried out in accordance with the General Directions given by the Charity Commissions. Examination includes a review of accounting records kept by the Charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the Accounts and seeking explanations from you as Trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the view given by the Accounts.

#### STATEMENT

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

1. which gives me reasonable cause to believe that in any material respect the requirements to keep accounting records in accordance with Section 41 of the Act, and to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act, have not been met.
2. Which, in my opinion, attention should be drawn, in order to enable a proper understanding of the accounts to be reached.

**MALMESBURY LEAGUE OF FRIENDS**

England & Wales - Charity number 261801

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# Accounts

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**MALMESBURY LEAGUE OF FRIENDS**

**Registered Charity No. 261801**

**ANNUAL REPORT AND ACCOUNTS**

**Year Ending 31st December 2022**

# MALMESBURY LEAGUE OF FRIENDS

## Annual Report for the year ended 31st December 2022

The Malmesbury League of Friends is a charity registered with the Charity Commissioners (No, 261801).

The Governing Instrument is the present Constitution, which complies with the requirements of the Charity Commissioners and was adopted on the 17th May 2007.

The registered address is that of the Treasurer.

Mr D.A. Rutherford, 23 Cowley Way, Sutton Benger,  
Chippenham, Wiltshire, SN15 4SD.

The Charity Trustees during the year to 31st December 2022 were as follows:

Mr D. Hide	Chairman	Re-elected 3rd May 2022
Mrs A. Lewis	Vice-Chairman	Re-elected 3rd May 2022
Mr D. Hide.	Hon. Secretary.	Elected. 3rd May 2022
Mr D.A. Rutherford	Hon. Treasurer	Re-elected 3rd May 2022
Mrs S. La Fontaine	Minutes Secretary	Re-elected 3rd May 2022
Mr K. Maslin	Applications Co-ordinator	Re-elected 3rd May 2022
Mrs P. Jones		Elected 12th July 2022
Mr H. Walmsley		Re-elected 9th May 2019
Mr P. Hewson		Re-elected 11th May 2021
Ms. H. Webb		Re-elected 11th May 2021
Mrs D. Halsey		Elected 9th January 2019
Ms. H Webb		Elected 9th January 2019

The object of the Charity is to relieve patients and former patients of local Hospitals, Care Homes, Care Centres, other Welfare Agencies, Societies and other invalids in the community who are sick, convalescent, disabled, handicapped, infirm or in need of financial assistance. New Trustees are appointed on a renewable term of three years.

The Trustees policy is generally to make grants to the NHS Trusts for the provision of extra comforts, initiatives and extra facilities for use in the local area by patients served by the above agencies. The Charity's income is made up of member's subscriptions, donations, legacies and interest from investments. Major fundraising has only ever been undertaken, in the past, for large building projects.

### Finances

Accounts for this year have been prepared in the usual format. Income, in the main, has been from investments and totalled £53,031.50 Our donations for the year totalled £90,457.62, a major donation of £30,000 was given to Dorothy House and a further donation of £5,500 was given to the Malmesbury Boxing Club. A complete list of donations are on Page 5 of this report.

# **MALMESBURY LEAGUE OF FRIENDS**

## **CHAIRMAN'S ANNUAL REPORT. JANUARY – DECEMBER 2022**

This has been another busy year for Malmesbury League of Friends (MLOF), mercifully without the continuing impact of coronavirus. So we were able to hold our usual six bi-monthly meetings, in our usual meeting place, the top floor of the MPCC, for which we are very grateful. We made donations totalling over £74,000 during the year, rather less than in 2021, a full list of which is in the Treasurer's report.

### **Trustees**

Following the resignation of Lucy Hay as our secretary, we were fortunate to welcome Philippa Jones as a new trustee, with the chairman doubling as secretary. There were no further changes during the year to the composition of the trustees, but there are likely to be a number of retirements at the AGM in May 2023.

### **MPCC/Athelstan House/Tolsey, Sherston**

We continue to enjoy excellent relations with both the Malmesbury Primary Care Centre (MPCC), Athelstan House (AH), and the Tolsey surgery in Sherston, all of which we have supported during the year. Donations for items of medical equipment to the MPCC totalled nearly £6,000, with £7,800 to AH and £2,500 to the Tolsey surgery.

Our AH contact, Fiona Hocken, has continued to work well with our MLOF liaison Paul Hewson. And we continue to enjoy an excellent relationship with our two GPs, Tom Estcourt and James Hanslip, and Charlotte Gorman, the MPCC's Practice Manager, who has been extremely supportive.

### **Defibrillators**

We provided funds to purchase a further three defibrillators, in Cowbridge, Burnham House and Chelworth, the latter situated in the wall of local company Alvan Blanch, with whom the cost was shared. This brings the total number in the local area paid, or partly paid, by MLOF, to 21. Further installations are planned for 2023, under the management of fellow trustee Paul Hewson, working with local expert Ray Sanderson.

### **Dorothy House**

We continue to enjoy close relations with Dorothy House Hospice Care (DH) in Winsley, near Bradford-on-Avon. DH launched a major £500,000 Always Here fund raising campaign in November, which was hugely successful. MLOF contributed to this with a donation of £30,000, presented outside their Malmesbury outlet.

### **Wiltshire Air Ambulance (WAA)**

In 2020, we donated £25,000 to WAA, but had been unable to hand this over formally due to Covid. But, on a hot sunny Saturday in August, we were delighted to do so at last when their Chief Executive flew in their helicopter to the Malmesbury Victoria Football ground, which also provided a major attraction for the town's Carnival Blast Off event.

### **Brighter Futures – GWH, Swindon**

We continue to maintain close contact with Brighter Futures, the fund-raising arm of Great Western Hospital (GWH) in Swindon. The new radiotherapy unit, for which we have donated £75,000, is now up and running, with its CT scanner, easing the journey, previously to Oxford, for the vital treatment provided there

## **Local organisations**

We continue to support local organisations that need our support and, during the year, we have helped the following:

- Seagry Primary School – Playground equipment - £5,000
- A counsellor for Malmesbury School, for one year Sept 22 – July 23 - £5,500
- HEALS – Christmas Appeal £1,000
- Alzheimer’s Society, Swindon - £500
- Doorway, Chippenham - £5,000
- Malmesbury Boxing Club - £10,000 – towards a new minibus
- Citizens Advice Wiltshire - £3,000
- Stay Safe Initiative - £750

## **Needy Individuals**

We remain committed to helping needy individuals and, during the year we helped:

- A disabled Malmesbury resident with an off road scooter
- A Malmesbury resident – repairs to her car to enable her to start work at GWH as a mental health nurse

Following a strategic review in early 2022, we decided to expand our help for needy individuals, following the huge increase in energy costs. This involved delivering leaflets for all the GPs at MPCC, writing to all local parish councils and Citizens Advice Wiltshire.

## **Malmesbury Area Community Trust (MACT)**

MACT is another, well endowed, local charity with whom we continue to work closely. During 2021, we shared the request for a Malmesbury School counsellor. MACT paid for this specialist for one year from 2021 whilst MLOF have paid a similar sum for the following year 2022-23.

## **Publicity/Communications**

I continue to believe that we should maintain a strong local profile. We always publicise our donations, subject to individual circumstances, on social media, local press and radio. Through the excellent work by Keith Maslin, we have ensured that the local community, via social media, are aware of the important work we undertake.

## **Conclusion**

All the donations made during the year have only been possible from the income derived from a substantial investment portfolio. This is largely due to the magnificent efforts of our long standing treasurer, David Rutherford who, after over 20 years, will be retiring at the next AGM. I pay tribute to him for his tireless work over very many years.

Finally, I thank all our trustees for their support, advice and time, which is much appreciated.

David Hide, Chairman – May 2023

**MALMESBURY LEAGUE OF FRIENDS No. 261801**

**Statement of Account for the Year Ending 31st December 2022**

<b><u>Receipts.</u></b>	<b>£</b>	<b>£</b>	<b><u>Payments.</u></b>	<b>£</b>	<b>£</b>
Subscriptions.	190.00.		ATTEND Subscription.	645.00	
Donations.	4,960.00		Website Maintenance.	35.99	
Refund	399.00		Examiner.	108.86	
Legacy.	499.23		Postage & Stationery.	222.01	
Interest.	<u>46,983.27</u>	53,031.50	Retirement Gift.	42.00	
			Trustee Expenses.	<u>285.06.</u>	1,338.92
			<b><u>Donations</u></b>		
			See Attached List.		90,457.62
Add Lloyds Bank as at 31 December 21		<u>61,872.68</u>	Add Lloyds Bank as at 31 December 2022		<u>23,107.64</u>
Total		<b><u>114,904.18.</u></b>			<b><u>114,904.18</u></b>

**Asset Valuation as at 31 December 2022**

COIF Investment Fund	1,137,142.98
M & G Optimal Income Fd.	110,358.57.
Schroeders Multi-Asset Fd,	<u>230,707.14.</u>

**Total:** **1,478,208.69.**

**Total Assets as at 31 December 2022**

Lloyds Bank	23,107.64
Investments	<u>1,478,208.69</u>

**1,501,316.33**

**Examined and found correct with books and vouchers produced.**



**T. Brown  
Independent Examiner**

Date 30/3/2023



**D. Rutherford  
Hon, Treasurer**

Date 30 MARCH 23

## Malmesbury League of Friends No. 261801

### Purchases & Donations 2022

#### Athelstan House

Healthcare Equipment	1,177.48	
Examination Couch	2,332.72	
Recliner Wheelchairs	<u>4,320.00</u>	7,830.20

#### Malmesbury Primary Care Centre

Medical Equipment	2,422.04	
PosiPerle Support Cushions	1,195.54	
FeNo Testing Machine	<u>3,478.80</u>	7,096.38

#### Donations

Friends of Malmesbury School	5,000.00	
Futon Co	423.00	
Stay Safe Initiative	750.00	
Doorway	5,000.00	
Disability Scooter	6,104.00	
Platinum Cleaning Co.	130.80	
Alzheimer's Big Band	500.00	
Beamer Ltd	1,247.00	
Brandon Defib.	1,452.00	
Wiltshire Citizen Advice	3,000.00	
Malmesbury Amateur Boxing Club.	10,000.00	
Athelstan Trust	5,500.00	
Cowbridge Defib.	1,500.00	
Mr. Skelhorn	214.20	
St John's Ambulance	1,475.64	
Dorothy House	30,000.00	
Tolsey Surgery	2,234.40	
HEALS	<u>1,000.00</u>	<u>75,531.04</u>

Total 90,457.62

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF THE MALMESBURY LEAGUE OF FRIENDS

I report on the Accounts of the Trust for the year ended 31st December 2022, which are set out on pages 4 and 5

#### RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER

As the Charity's Trustees you are responsible for the preparation of the Accounts: You consider that the Audit requirement of Section 43 (2) of the Charity Act 1993 (The Act) does not apply.

It is my responsibility to state, on the basis of procedures specified in the General directions by the Charity Commissioners under Section 43 (7) of the Act, whether particular matters have come to my attention.

#### BASIS OF REPORT

My examination was carried out in accordance with the General Directions given by the Charity Commissions. Examination includes a review of accounting records kept by the Charity and a comparison of the Accounts presented with those records. It also includes consideration of any unusual items or disclosures in the Accounts and seeking explanations from you as Trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently I do not express an audit opinion on the view given by the Accounts.

#### STATEMENT

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

1. Which gives me reasonable cause to believe that in any material respect the requirements to keep accounting records in accordance with Section 41 of the Act and to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act, have not been met.
2. Which, in my opinion, attention should be drawn, in order to enable a proper understanding of the Accounts to be reached.



T. BROWN FCCA  
Grosvenor House Practice Ltd  
Avening  
Priory Park  
London Road  
TETBURY GL8 8HZ

**MALMESBURY LEAGUE OF FRIENDS**

England & Wales - Charity number 261801

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# Accounts

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**MALMESBURY LEAGUE OF FRIENDS**

**Registered Charity No. 261801**

**ANNUAL REPORT AND ACCOUNTS**

**Year Ended 31st December 2021**

## MALMESBURY LEAGUE OF FRIENDS

### Annual Report for the year ended 31st December 2021

The Malmesbury League of Friends is a charity registered with the Charity Commissioners (No, 261801).

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The registered address is that of the Treasurer.

Mr D.A. Rutherford, 23 Cowley Way, Sutton Benger,  
Chippenham, Wiltshire, SN15 4SD.

The Charity Trustees during the year to 31st December 2021 were as follows:

Mr D. Hide	Chairman	Re-elected 11th May 2021
Mrs A. Lewis	Vice-Chairman	Re-elected 11th May 2021
Mrs L. Hay	Hon. Secretary	Re-elected 11th May 2021
Mr D.A. Rutherford	Treasurer	Re-elected 11th May 2021
Mrs S. La Fontaine	Minutes Secretary	Re-elected 11th May 2021
Mr K. Maslin	Applications Co-ordinator	Re-elected 11th May 2021
Mr H. Walmsley		Re-elected 9th May 2019
Mr P. Hewson		Re-elected 11th May 2021
Ms. H. Webb		Re-elected 11th May 2021
Mrs D. Halsey		Elected 9th January 2019
Mrs J. Jones		Resigned
Mr P. Rice		Elected 11th May 2021

The object of the Charity is to relieve patients and former patients of local Hospitals, Care Homes, Care Centres, other Welfare Agencies, Societies and other invalids in the community who are sick, convalescent, disabled, handicapped, infirm or in need of financial assistance. New Trustees are appointed on a renewable term of three years.

The Trustees policy is generally to make grants to the NHS Trusts for the provision of extra comforts, initiatives and extra facilities for use in the local area by patients served by the above agencies. The Charity's income is made up of member's subscriptions, donations, legacies and interest from investments. Major fundraising has only ever been undertaken, in the past, for large building projects.

### Finances

Accounts for this year have been prepared in the usual format. Income, in the main, has been from investments and totalled £106,360.71. We cashed in our investment of £50,000 in the M & G Charifund which gave as a return of £61,044.51. The remainder of our income, £32,632.78 came from our investment in the COIF Investment Fund and £12,683.42 from our other investments and donations. Our donations for the year totalled £96,078.42, two major donations of £25,000 each were made to Wiltshire Air Ambulance and Brighter Futures, the Great Western Hospital charity. A further donation of £10,000.00 was made to Julia's House.

# **MALMESBURY LEAGUE OF FRIENDS**

## **CHAIRMAN'S ANNUAL REPORT. JANUARY – DECEMBER 2021**

This has been another busy year for Malmesbury League of Friends (MLOF), with the continuing impact of coronavirus. Nevertheless, we were able to hold six meetings, four by ZOOM.

We made donations totalling over £98,000 during the year, a full list of which is in the Treasurer's report.

### **Trustees**

During the year, Jane Jones stood down as a trustee, due to work commitments which made attendance at meetings difficult. In her place, Phil Rice, who had been secretary of the Malmesbury Area Community Trust (MACT) joined as a trustee. But, in February 2022, he sadly passed away very suddenly. He will be much missed. Three MLOF trustees attended his funeral.

### **MPCC/Athelstan House**

We continue to enjoy excellent relations with both the Malmesbury Primary Care Centre (MPCC) and Athelstan House (AH), both of which we have supported during the year. Donations for items of medical equipment to the MPCC totalled over £15,000 and £6,300 to AH.

Our new AH contact, Fiona Hocken, has worked well with our MLOF liaison Paul Hewson, who replaced Jane Jones. Charlotte Gorman succeeded Dave Grogan as MPCC's Practice Manager, and we have developed an excellent working relationship with her.

### **Defibrillators**

We provided funds to purchase a further three four defibrillators, in Garsdon, Estcourt, Braydon, and at the Malmesbury Youth Football Club, bringing the total to 18 now installed in local villages within a ten-mile radius of Malmesbury, which have been widely welcomed by their residents.

### **Dorothy House**

We continue to enjoy close relations with Dorothy House Hospice Care in Winsley, near Bradford-on-Avon and attended their Late Summer Party, when we met their CEO, Wayne de Lieuw, who told us of his plans to open Neighbourhood Teams in a number of locations, including Malmesbury. We expressed an interest in supporting this and have already established a liaison in this connection between DH and MPCC.

### **Wiltshire Air Ambulance (WAA)**

We continue to enjoy a very friendly relationship with WAA, to whom we donated £25,000 in 2020. We still hope to formally present this to them if they are able to attend, with their helicopter, the planned Family Fun Day at the Worthneys in August this summer.

### **Brighter Futures – GWH, Swindon**

We continue to maintain close contact with Brighter Futures, the fund-raising arm of Great Western Hospital (GWH) in Swindon. The new radiotherapy unit, for which we have donated £75,000, is now nearing completion with a planned opening in June 2022. Two trustees visited the site in July and were able to inspect the work in progress.

We donated in 2021 £25,000 towards a CT scanner, to be installed within the unit, but not included in the original specification. This will mean that patients will be able to have all their treatments at GWH.

### **Julia's House**

We donated £10,000 to Julia's House, as part of its latest £3 million fund raising campaign. In December, the chairman attended their Carol Service in Devizes, when he was able to meet their CEO, who expressed his gratitude for our continuing support.

### **Local Malmesbury organisations**

Local organisations have not been forgotten as, during the year, we have helped the following:

- Seagry Primary School – Playground equipment - £5,000
- A counsellor for Malmesbury School, due to be paid in September 2022 for one year - £5,500
- HEALS

During the year, we were approached by the Community Well Being Café/ Pathways Project by a MPCC staff member, with a view to supporting the development of a plot of land adjacent to the MPCC, on which a garden and shed could be placed. This has now been put on hold, as the individual concerned has left the MPCC. But we remain supportive, particularly if the Men's Shed, another project in which MLOF has expressed an interest in supporting, can be placed there.

### **Needy Individuals**

We remain committed to helping needy individuals and, during the year we helped:

- A Crudwell teenager travel to the USA for a life changing operation
- A Great Somerford resident with central heating oil
- A Glovers Court resident with essential furniture

Following a strategic review in early 2022, we decided to expand our help for needy individuals, following the upcoming huge increase in energy costs, which are likely to have a major impact on family budgets later in the year.

### **Malmesbury Area Community Trust (MACT)**

MACT is another, well endowed, local charity with whom we work closely. During 2021, we shared the request for a Malmesbury School counsellor. MACT will pay for this specialist for one year from 2021 whilst MLOF will pay a similar sum for the following year 2022-23.

### **Publicity/Communications**

I continue to believe that we should maintain a strong local profile. We always publicise our donations, subject to individual circumstances, on social media, local press and radio. Through the excellent work by Keith Maslin, we have ensured that the local community are aware of the important work we undertake.

### **Conclusion**

Despite the ongoing limitations from COVID, we have been able to continue with our important role, making donations to those organisations and needy individuals who need our support and this will of course continue.

The availability of the conference room in the MPCC, for which we are extremely grateful, makes a huge difference to the effectiveness of our meetings and we very much hope that these can continue.

Finally, I would like to thank all our trustees, and especially the officers, for their support and hard work over the last twelve months.

David Hide

Chairman

May 2022

**MALMESBURY LEAGUE OF FRIENDS**

**Statement of Account for the Year Ending 31st December 2021**

<u>Receipts.</u>	£.	£.	<u>Payments.</u>	£.	£.
Subscriptions	220.00		ATTEND Subscription	614.00	
Donations	255.00		Website Maintenance	52.77	
Refund	96.00		Travel Mileage	222.58	
Interest.	44,745.20		Examiner	116.96	
Sale of M & G.	<u>61,044.51.</u>	106,360.71	Retirement Gift	40.00	
			Zoom Fees	<u>129.51</u>	1,175.82
			<b><u>Donations</u></b>		
			See Attached List		96,078.42
Add Lloyds Bank as at 31 December 2020		<u>52,766.21.</u>	<u>Add</u> Lloyds Bank 31 Dec 2021.		<u>61,872.68</u>
		<b><u>159,126.92.</u></b>			<b><u>159,126.92</u></b>

<u>Asset Valuation as at 31 December 2021.</u>		<u>Total Assets as at 31 December 2021.</u>	
COIF Investment Fund.	1,269,173.73	Lloyds Bank	61,872.68
M & G Optimal Income Fund.	126,927.70	Investments.	<u>1,652,209.49</u>
Schroeder's Multi-Asset Fund.	<u>256,108.06</u>		
<b><u>Total.</u></b>	<b><u>1,652,209.49</u></b>	<b><u>Total.</u></b>	<b><u>1,714,082.17</u></b>

Examined and found correct with books and vouchers produced.



T. Brown.

Independent Examiner.

Date...05/09/2022...



D. Rutherford

Hon. Treasurer

Date...4 Apr 22.....

**Malmesbury League of Friends No. 261801**

**Purchases & Donations 2021**

**Athelstan House**

Garden Furniture 2,719.90

**Malmesbury Primary Care Centre**

Computer Equipment	1,055.92	
J & M Flooring Ltd	3,412.12	
Mangar Health	2,230.87	
Healthcare Monitors Ltd	8,148.00	
Computer Equipment	749.00	
Shawn Carr Ltd	<u>3,858.00</u>	19,453.91

**Donations**

Fiona Danford	255.00	
Malmesbury Boxing Club	3,000.00	
Tolsey Surgery	2,272.86	
Wiltshire Air Ambulance	25,000.00	
Brighter Futures G.W.H.	25,000.00	
Crudwell Parish	1,184.00	
Avie' Appeal	5,000.00	
Mr S. Skelhorn	692.75	
Malmesbury Youth Football	1,500.00	
Julia's House	<u>10,000.00</u>	<u>73,904.61</u>

**Total** 96,078.42

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF THE MALMESBURY LEAGUE OF FRIENDS

I report on the Accounts of the Trust for the year ended 31st December 2021, which are set out on pages 6 and 7

### RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER

As the Charity's Trustees you are responsible for the preparation of the Accounts: You consider that the Audit requirement of Section 43 (2) of the Charity Act 1993 (The Act) does not apply.

It is my responsibility to state, on the basis of procedures specified in the General directions by the Charity Commissioners under Section 43 (7) of the Act, whether particular matters have come to my attention.

### BASIS OF REPORT

My examination was carried out in accordance with the General Directions given by the Charity Commissions. Examination includes a review of accounting records kept by the Charity and a comparison of the Accounts presented with those records. It also includes consideration of any unusual items or disclosures in the Accounts and seeking explanations from you as Trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently I do not express an audit opinion on the view given by the Accounts.

### STATEMENT

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

1. Which gives me reasonable cause to believe that in any material respect the requirements to keep accounting records in accordance with Section 41 of the Act and to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act, have not been met.
2. Which, in my opinion, attention should be drawn, in order to enable a proper understanding of the Accounts to be reached.



**T. BROWN FCCA**  
Grosvenor House Practice Ltd  
Avening  
Priory Park  
London  
Road  
TETBURY  
GL8 8HZ

**MALMESBURY LEAGUE OF FRIENDS**

England & Wales - Charity number 261801

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# Accounts

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# **MALMESBURY LEAGUE OF FRIENDS**

Registered Charity No. 261801

## **ANNUAL REPORT AND ACCOUNTS**

Year Ending 31st December 2020

# **MALMESBURY LEAGUE OF FRIENDS**

## **Annual Report for the Year Ended 31st December 2020**

The Malmesbury League of Friends (MLOF) is a Charity registered with the Charity Commissioners (No. 261801).

The Governing Instrument is the present Constitution, which complies with the requirements Of the Charity Commissioners and was adopted on the 17th May 2007. The registered address is that of the Treasurer.

Mr. D. A. Rutherford, 23 Cowley Way, Sutton Benger,  
Chippenham, Wiltshire, SN15 4SD.

The Charity Trustees during the year to December 2020 were as follows:

Mr D. Hide	Chairman	Re-elected 14th July 2020
Mrs A. Lewis	Vice-Chairman	Re-elected 14th July 2020
Mrs L. Hay	Hon. Secretary	Re-elected 14th July 2020
Mr D. Rutherford	Hon. Treasurer	Re-elected 14th July 2020
Mrs S. La Fontaine	Minutes Secretary	Re-elected 14th July 2020
Mr K. Maslin	Applications Co-ordinator	Re-elected 14th July 2020
Mr H. Walmesley		Elected 8 May 2019
Mr P. Hewson		Elected 14 November 2018
Mrs J. Jones		Elected 12 September 2018
Ms H. Webb		Elected 14 November 2018
Mrs D. Halsey		Elected 9 January 2019

The object of the Charity is to relieve patients and former patients of local Hospitals, Care Homes, Care Centres, other welfare Agencies, Societies and other invalids in the Community who are sick, convalescent, disabled, handicapped, infirm or in need of financial assistance. New Trustees are appointed on a renewable term of 3 years.

The policy of the Trustees is, generally, to make grants to NHS Trusts and for the provision of extra comforts, initiatives and extra facilities for use in the local area by patients served by the above Agencies. The Charity's income is made up of member's subscriptions, donations, legacies and interest from investments. Major fundraising has only ever been undertaken, in the past, for large building projects.

### **Finances**

Accounts for this year have been prepared in the usual format. Income, in the main, has been from investments and totalled £47,363.91. Our donations for the year totalled £71,147.02. Details are listed on Page 4 & 5 of the report.

# **CHAIRMAN'S ANNUAL REPORT – JANUARY – DECEMBER 2020**

This has been a busy year for Malmesbury League of Friends (MLOF), with the continuing impact of coronavirus. Nevertheless, we were able to hold five meetings via ZOOM.

We made donations totalling over £71,000 during the year, a full list of which is in the Treasurer's report.

We also received \_\_\_\_\_ donations during the year from local individuals, who either left MLOF a small legacy in their wills, or from collections at their funerals.

## **MPCC/Athelstan House**

We continue to enjoy excellent relations with both the Malmesbury Primary Care Centre (MPCC) and Athelstan House (AH), both of which we have supported during the year. Donations for items of medical equipment to the MPCC totalled over £11,000 and £7,000 to AH.

A new AH manager, Cathy Fountain, was appointed, supported by Client Relations Officer Sharon Villegas, who attended our meetings. One of our trustees, Jane Jones, continues to act as a liaison between AH & MLOF, which is proving very successful.

## **Defibrillators**

We provided funds to purchase a further three defibrillators, in Hankerton, Great Somerford and Oaksey, bringing the total to 12 now installed in local villages within a ten-mile radius of Malmesbury, which have been widely welcomed by their residents. The agreement to pay for a further three defibrillators in Malmesbury itself to fill gaps that currently exist, remains on hold.

## **Dorothy House**

We continue to enjoy close relations with Dorothy House Hospice Care in Winsley, near Bradford-on-Avon and a donation of £10,000 was made during the year.

During the year, we were approached to purchase the building in which their Malmesbury outlet is situated but, after careful consideration, we decided not to proceed. But we remain interested in supporting the possible opening of an outreach centre in or near Malmesbury in the future.

## **Wiltshire Air Ambulance (WAA)**

In February, a number of trustees visited the new WAA headquarters near Melksham, where we presented a cheque for £25,000 to help offset the cost, over £100,000, of leasing another helicopter while their own underwent unplanned technical rectification.

## **Brighter Futures – GWH, Swindon**

We continue to maintain close contact with Brighter Futures, the fund-raising arm of Great Western Hospital (GWH) in Swindon.

The new radiotherapy unit, for which we have donated £75,000, is now under construction with a planned opening in December. We have also agreed to donate in 2021 a further £25,000 towards a CT Scanner, to be installed within the unit, but not included in the original specification. This will mean that patients will be able to have all their treatments at GWH.

### **Local Malmesbury organisations**

Local voluntary organisations and needy individuals have not been forgotten as, during the year, we have helped the following:

- Car to enable patient to attend hospital appointments
- Shed to store equipment for Helping Community clear litter
- HEALS - £2,000 towards their COVID programme
- Malmesbury Boxing Club - £3,000
- Furniture for a single mother

### **Publicity/Communications**

I continue to believe that we should maintain a strong local profile, but the potential for this has clearly been limited by COVID. Nevertheless, mainly through the excellent work by Keith Maslin, we have ensured that the local community are aware of the important work we undertake.

In February, before the COVID restrictions began, we took part in the Community Day in the Town Hall, where we were able to speak with many local visitors.

### **Conclusion**

The last twelve months have been unprecedented due to COVID. But we have been able to continue with our important role, making donations to those organisations and needy individuals who need our support, and this will of course continue. Hopefully, if COVID restrictions are lifted, we will be able to meet again in the MPCC.

Finally, I would like to thank all our trustees, and especially the officers, for their support and hard work over the last twelve months.

David Hide

Chairman

May 2021

# MALMESBURY LEAGUE OF FRIENDS

## Statement of Account for the Year Ending 31st December 2020

<b>Receipts</b>	£	£	<b>Payments</b>	
Subscriptions	165.00		ATTEND Subscriptions	585.00
Donations	<u>300.00</u>	465.00	Website Maintenance	57.56
<b>Interest</b>			Travel Mileage	92.45
M & G Charifund	2,787.64		Artwork	153.54
M & G Optimal	3,013.04		Stationery & Stamps	186.53
Multi-Asset	9,101.07		Examiner	120.96
COIF Invest. Fd.	<u>31,997.16</u>	46,898.91	Chairman Expenses	70.51
			Cartwell Community Tst.	50.35
			Digiprint	121.00
			Visit to Wiltshire Air Amb.	<u>164.67</u>
				1,602.57
			<b>Purchases &amp; Donations</b>	
			See attached List	71,147.02
			<b>Add</b>	
			Lloyds 31 Dec 20	54,975.05
			<b>Less</b> Unpres. Cheque	<u>2,208.84</u>
				<u>52,766.21</u>
Add Lloyds Bank as at 31 Dec 19		<u>78,151.89</u>		
		<u>125,515.80</u>		<u>125,515.80</u>

### Asset Valuation as at 31 December 2020

### Total Assets as at 31 December 2020

COIF Investment Fund	1,111,502.05	Lloyds Bank	52,766.21
M & G Optimal Income Fund	126,433.36	Investments	1,535,516.93
M & G Charifund	57,108.09		
Schroders Multi-Asset Fund	<u>240,473.43</u>		
<b>Total</b>	<b>1,535,516.93</b>	<b>Total</b>	<b><u>1,588,283.14</u></b>

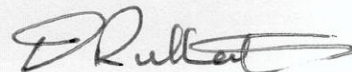
Examined and found correct with books and vouchers produced.



T. Brown FCCA

Independent Examiner

Date 20/4/21



D. Rutherford

Hon. Treasurer

Date 20/4/21

## **Malmesbury League of Friends**

### **Purchases & Donations 2020**

#### **Athelstan House**

4 Shower & Commode Chairs	1,300.00	
Interactive Table	<u>5,864.73</u>	7,164.73

#### **Malmesbury Primary Care Centre**

Spirometer & Dopplar Machines	2,935.17	
Measuring Device and parts	3,100.80	
Speech Recognition Device	3,273.00	
ECG Machine	<u>2,208.84</u>	11,517.81

#### **Donations**

Hankerton Parish	1,500.00	
Thursday Club	440.65	
Martin Gray	2,823.00	
Jackdaw Club	500.00	
Gt. Somerford Parish	1,430.00	
Ms Newham	177.00	
Wiltshire Air Ambulance	25,000.00	
Oaksey Parish	1,100.00	
Dorothy House	10,000.00	
HEALS of Malmesbury	2,000.00	
Westlea	1,528.59	
Ms J. Hall	427.93	
J Taylor	241.31	
Doorway Wilts Ltd	5,000.00	
Dorothy House	200.00	
Carpet Cleaning Ltd	<u>96.00</u>	<u>52,464.48</u>

**Total** **71,147.02**

## **INDEPENDENT EXAMINER'S REPORT**

### **TO THE TRUSTEES OF THE MALMESBURY LEAGUE OF FRIENDS**

I report on the Accounts of the Trust for the year ended 31st December 2020, which are set out on pages 4 and 5.

#### **RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER**

As the Charity's Trustees you are responsible for the preparation of the Accounts: You consider that the Audit requirement of Section 43 (2) of the Charity Act 1993 (The Act) does not apply.

It is my responsibility to state, on the basis of procedures specified in the General directions by the Charity Commissioners under Section 43 (7) of the Act, whether particular matters have come to my attention.

#### **BASIS OF REPORT**

My examination was carried out in accordance with the General Directions given by the Charity Commissions. Examination includes a review of accounting records kept by the Charity and a comparison of the Accounts presented with those records. It also includes consideration of any unusual items or disclosures in the Accounts and seeking explanations from you as Trustees concerning such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently I do not express an audit opinion on the view given by the Accounts.

#### **STATEMENT**

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

1. Which gives me reasonable cause to believe that in any material respect the requirements to keep accounting records in accordance with Section 41 of the Act and to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the Act, have not been met.
2. Which, in my opinion, attention should be drawn, in order to enable a proper understanding of the Accounts to be reached.



T. BROWN FCCA  
Grosvenor House Practice Ltd  
Avening  
Priory Park  
London Road  
TETBURY GL8 8HZ