

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST BARTHOLOMEWS NURSES

England & Wales · Charity number 275165

Details

Status Registered

Legal form Other

Registered 1978-03-23

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

Contact

Address The Post Room
St. Bartholomews Hospital
West Smithfield
London
EC1A 7BE

Phone 020 7377 7000

Email info@bartsleagueofnurses.org

Website bartsleagueofnurses.org

Activities

Objects: SEE INDIVIDUAL CONSTITUENTS

Activities: Educational grants to members of the League of St. Bartholomew's Nurses and Benevolent Grants to League members and nurses who have trained at St. Bartholomew's Hospital (EC1A 7BE) and are in financial difficulty or in need of friendship and advice.

Classification

- **How:** Makes Grants To Individuals, Provides Other Finance
- **What:** Education/training, The Prevention Or Relief Of Poverty
- **Who:** Other Defined Groups

Geography

- Australia
- Canada
- Ireland
- Scotland
- South Africa
- United States
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-04-30	£45,370	£132,235	-	-
2024-04-30	£47,324	£121,102	-	-
2023-04-30	£100,933	£112,434	-	-
2022-04-30	£87,079	£137,599	-	-
2021-04-30	£82,025	£110,531	-	-

Trustees

Name	Role	Appointed
Jill Gillett	Chair	2018-01-01
Alexandra Elizabeth Hayward		2020-11-09
DIANA ELIZABETH SHERLAW		
Elizabeth Kathleen Wood-Dow OBE		2018-10-13
Nicola Marks		2020-10-11
ROSEMARY ELLEN CAMPBELL		2014-02-05
Susan Julia Merry		2023-10-14

Linked charities

- HELEN BAINES MEMORIAL SCHOLARSHIP FUND (275165-1)
- STEWART BAINES COLTART SCHOLARSHIP FUND (275165-2)
- WILLIAM DERRICK COLTART AWARD (275165-3)
- BENEVOLENT FUND (275165-4)

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST BARTHOLOMEWS NURSES

England & Wales - Charity number 275165

Accounts

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2025

Charity Number : 275165

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CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

TRUSTEES' ANNUAL REPORT FOR THE YEAR ENDED 30 APRIL 2025

Reference and administration details

Registered charity number: 275165

Charity's principal address: The Post Room, St. Bartholomew's Hospital
West Smithfield, London EC1A 7BE

Names of Charity Trustees who manage the charity:

Mrs E Wood-Dow OBE	President of the League
Mrs N Marks	Honorary General Secretary
Mrs R E Campbell	Honorary Treasurer
Mrs S Merry	Honorary Secretary – Benevolent Fund
Mrs J Gillett (Chair)	Honorary Treasurer – Benevolent Fund
Miss D Sherlaw	Honorary Secretary – Stewart Baines Coltart Scholarship Fund
Mrs A Hayward	Honorary Treasurer – Stewart Baines Coltart Scholarship Fund

Dame Nancy Hallett External adviser to the Trustees

Structure, governance and management

The League is governed by a constitution document that was last revised and updated in 2022 and is managed by the League Executive Committee whose members are elected every three years with the President serving a five-year term of office. The President may be re-elected for a second term. The Trustees have met twice this year. They have reviewed the Governance Code for smaller charities, updated the Risk Register, ratified a Safeguarding policy and procedure and approved an updated Grant Making Policy of the Scholarship fund.

The League's Investment Managers attended the November 2024 meeting to present the annual performance review of investments.

A strategy day was held in March 2025 for all committee members of the League to review the membership, activities of the League and associated charities and determine priorities for the next 3-5 years.

Objectives and activities

The objects of the League are:

1. To further the best interests of nursing and the nursing profession.
2. To afford mutual help and to promote social interaction.
3. To promote and maintain a Benevolent Fund for the benefit of League members and St. Bartholomew's nurses who trained prior to September 1993.
4. To promote and maintain Scholarship Funds for the benefit of League members.

The Benevolent Fund is available to provide assistance not only to League members, but also to any nurse who trained at St. Bartholomew's Hospital or who qualified as a nurse at St. Bartholomew's School of Nursing and Midwifery prior to September 1993. The sub-committee, which administers the Fund on behalf of the League, is concerned to give assistance to those in need arising by reason of youth, age, ill-health, disability, financial hardship or other disadvantage. The sub-committee welcomes all enquiries and applications and met five times this year, with urgent requests being considered throughout the year.

After due consideration of diminishing requests, safeguarding requirements and increased emphasis on regional networks and events the Countrywide Network of Friendship was discontinued.

The Scholarship Fund financially assists members of the League with course and conference fees and associated costs of study. A sub-committee administers the fund and meets four times a year to consider applications.

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

TRUSTEES' ANNUAL REPORT FOR THE YEAR ENDED 30 APRIL 2025

All committees meet virtually by zoom/Teams or are hybrid, being held in person with some members attending remotely.

Achievement and performance

In line with their Charitable Objects and mindful of the Public Benefit requirement of the Charity Commission the Benevolent Fund has provided financial assistance to help relieve physical, mental, social and emotional needs or disadvantage including emergency assistance.

Similarly, the League Scholarship Fund has supported members with professional studies in order to enhance their skills and knowledge for the benefit of the organisations for which members work and, in turn, for the patients and communities they serve. The Fund has also supported League members in a wide range of other studies that provide opportunities for personal development and transferable skills.

Details of achievements and performance are published annually in the League News and presented to the Annual General Meeting. Some beneficiaries are resident outside England and Wales and transfer of any money is through the regulated banking system.

Financial Review

The Trustees' policy is to ensure sound investment of the charitable funds and expenditure to fulfil the charitable objects. Investments are managed by Coutts Charity Investment Team who provide quarterly investment reports and an annual investment performance review. No grant funding from central government or local authority is received and during the current year no income has been received from outside the UK. No trustee has received remuneration other than expenses incurred.

Declaration

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

Signed on behalf of the charity's trustees:



Jill Gillett
Chair of trustees
17th July 2025

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2025

Charity Number : 275165

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

Independent examiner's report to the trustees of the Charities in Association with the League of St. Bartholomew's Nurses

I report to the charity trustees on my examination of the accounts of the Charities in Association with the League of St. Bartholomew's Nurses for the year ended 30 April 2025.

Responsibilities and basis of report

As the charity trustees of the Charitable Funds 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 Charitable Funds' accounts carried out under section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charitable Funds as required by section 130 of the Act; or
2. the accounts do not accord with the accounting records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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



J.R.Champion FCA
McLean Reid
Chartered Accountants & Registered Auditors
1 Forstal Road
Aylesford
Kent
ME20 7AU

Date: 18th July 2025

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

CONSOLIDATED STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2025

	Benevolent Fund (pages 6 to 7) £	Stewart Baines Coltart Scholarship Fund (pages 8 to 9) £	2025 Total £	2024 Total £
Receipts				
Donations, legacies and other similar receipts				
Donations & legacies	5653	1160	6813	17000
Tax reclaim on gift aid donations	75	-	75	29
Grants returned	-	-	-	1000
Investment income receipts				
Income from investments	27935	9495	37430	28104
Deposit account interest	898	154	1052	1191
Income from Trust funds	-	-	-	-
Receipts from sale of investments	71927	655	72582	58009
TOTAL RECEIPTS	106488	11464	117952	105333
Payments				
Charitable payments				
Grants paid	90731	20163	110894	97997
Management and administration	4870	734	5604	6446
Other expenditure				
Purchase of investments	-	-	-	-
League News costs	15737	-	15737	16659
TOTAL PAYMENTS	111338	20897	132235	121102
Net (payments)	(4850)	(9433)	(14283)	(15769)
<i>Cash funds last year end</i>	<i>64680</i>	<i>16123</i>	<i>80803</i>	<i>96572</i>
Cash funds this year end	59830	6690	66520	80803

CONSOLIDATED STATEMENT OF ASSETS AND LIABILITIES FOR THE YEAR ENDED 30 APRIL 2025

	Benevolent Fund (pages 6 to 7) £	Stewart Baines Coltart Scholarship Fund (pages 8 to 9) £	2025 Total £	2024 Total £
Cash funds				
Bank deposit account	58801	6189	64990	78489
Bank current account	1026	500	1526	2310
Cash in hand	3	1	4	4
	59830	6690	66520	80803
Investment assets				
Investments at cost	1311138	497391	1808529	1964298
Investments at market value	1547071	543519	2090590	2064588

It is the Trustees' policy to accumulate sufficient funds to realise the Trust Deed objectives. All funds are unrestricted.

BENEVOLENT FUND

STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2025

	Note	2025 £	2024 £
Receipts			
Donations, legacies and other similar receipts			
Donations		653	9500
Legacies		5000	-
Tax reclaims on gift aid donations	2	75	29
Investment income receipts			
Income from investments		27935	21179
Deposit account interest		898	969
Other receipts			
Receipts from sale of investments		71927	52265
TOTAL RECEIPTS		<u>106488</u>	<u>83942</u>
Payments			
Charitable payments			
Grants & gifts paid		90731	71836
Publication of League News		9573	10062
League News postage & stationery costs		6164	6597
Management and administration	5	4870	5641
Other expenditure			
Purchase of investments		-	-
		<u>111338</u>	<u>94136</u>
Net (payments)		(4850)	(10194)
<i>Cash funds last year end</i>		<u>64680</u>	<u>74874</u>
Cash funds this year end		<u>59830</u>	<u>64680</u>

STATEMENT OF ASSETS AND LIABILITIES AS AT 30 APRIL 2025

	Note	2025 £	2024 £
Cash funds			
Bank deposit account		58801	62867
Bank current account		1026	1810
Cash floats	6	3	3
		<u>59830</u>	<u>64680</u>
Investment assets			
Investments at cost	7	<u>1311138</u>	<u>1466303</u>
Investments at market value	7	<u>1547071</u>	<u>1545016</u>

BENEVOLENT FUND

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2025

1. Accounting basis

These accounts have been prepared using the "receipts and payments basis" and comply with section 133 of the Charities Act 2011.

2. Income tax recovery

The Benevolent Fund has received income tax refunds totalling **£75** (2024: £29) during the year. This represents income tax reclaimed on gift aid donations received during the tax year to 5th April 2024.

3. Accountancy charges

The Benevolent Fund has paid accountancy charges of **£1380** (2024: £1380) to The League of St. Bartholomew's Nurses General Fund in respect of the share of accountancy charges for the year ended 30th April 2024. This sum is shown as part of the "management and administration" cost in the accounts.

4. Stockbroker fees

Included in "management and administration" costs is **£1928** (2024: £2265) relating to the administration costs incurred by Coutts.

These sums are shown as part of the "management and administration" cost in the accounts.

5. Management and administration costs

Along with the expenditure noted in 3) and 4) above, these costs also include the cost of trustee meetings along with office and communication costs.

6. Cash floats

Included in the cash float is a figure of **£3** (2024: £3) held by the Stockbrokers.

7. Investments

	Nominal	Cost	Market value
		£	£
CMAF Global Balanced	1311138 units	1311138	1547071
Total as at 30th April 2025		1311138	1547071

APPROVAL OF ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2025

I approve the statement of receipts and payments, statement of assets and liabilities and notes on pages 6 and 7 and confirm that I have made available all relevant records and information for their preparation.



Jill Gillett
Hon. Treasurer
17th July 2025

STEWART BAINES COLTART SCHOLARSHIP FUND

STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2025

	Note	2025 £	2024 £
Receipts			
Donations, legacies and other similar receipts			
Donations received		1160	-
Legacies received		-	7500
Investment income receipts			
Income from investments		9495	6925
Deposit account interest		154	222
Income from JG Hammond Trust			-
Other receipts			
Receipts from sale of investments		655	5744
Awards returned		-	1000
TOTAL RECEIPTS		<u>11464</u>	<u>21391</u>
Payments			
Charitable payments			
Grants paid		20163	26161
Management and administration	2	734	805
Share of accountancy fees	3	-	-
TOTAL PAYMENTS		<u>20897</u>	<u>26966</u>
Net receipts (payments)		(9433)	(5575)
<i>Cash funds last year end</i>		<u>16123</u>	<u>21698</u>
Cash funds this year end		<u>6690</u>	<u>16123</u>

STATEMENT OF ASSETS AND LIABILITIES AS AT 30 APRIL 2025

	Note	2025 £	2024 £
Cash funds			
Bank deposit account		6189	15622
Bank current account		500	500
Cash floats	4	<u>1</u>	<u>1</u>
		<u>6690</u>	<u>16123</u>
Investment assets			
Investments at cost	5	<u>497391</u>	<u>497995</u>
Investments at market value	5	<u>543519</u>	<u>519572</u>

STEWART BAINES COLTART SCHOLARSHIP FUND
NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2025

1. Accounting basis

These accounts have been prepared using the "receipts and payments basis" and comply with section 133 of the Charities Act 2011.

2. Management and administration

The Stewart Baines Coltart Scholarship Fund has paid administration charges from Coutts totalling **£655** (2024: £744).

3. Accountancy charges

The Stewart Baines Coltart Scholarship Fund has paid accountancy charges of **£nil** (2024: £nil) to The League of St. Bartholomew's Nurses General Fund in respect of the share of accountancy charges for the year ended 30th April 2024.

4. Cash floats

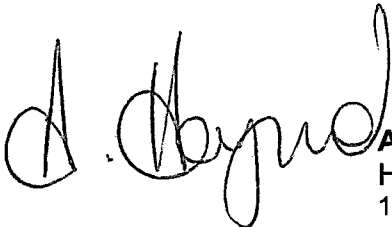
Included in the cash float is a figure of **£1** (2024: £1) held by the Stockbrokers.

5. Investments

		2025		2024	
Units	Market Value	Cost	Market Value	Cost	
	£	£	£	£	
Equator ICAV Coutts Multi Asset Global Balanced Fund	461190	543519	497391	519572	497995
		543519	497391	519572	497995

APPROVAL OF ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2025

I approve the statement of receipts and payments, statement of assets and liabilities on page 8 and the notes above and confirm that I have made available all relevant records and information for their preparation.


Alexandra Hayward
 Hon. Treasurer
 17th July 2025



Scholarship Committee Annual Report May 2025

The Stewart Baines Coltart Scholarship Fund

Registered Charity 275165

Madam President and members of the League, I have great pleasure in presenting the Annual Report of the Stewart Baines Coltart Scholarship Fund Committee for the financial year ending 30th April 2025.

The Scholarship Fund continues to provide fully paid-up League members with financial assistance to help enhance life, career and retirement, by supporting study and associated costs for courses and conferences.

The committee has met on four occasions over the past year. We have had greater success in running hybrid meetings and have also run two virtual meetings. Committee members have recorded a high level of attendance. Minutes of the meetings are available on request.

We have six League members on the committee, as well as an Honorary Secretary, Treasurer, Honorary Officers and Trustees. If any League members are interested in serving on the committee, please don't hesitate to contact the Honorary Secretary for more information. We encourage potential committee members to observe meetings before making a decision about joining the committee for a period of 3 years, with an opportunity to serve a further 3 years.

This year, 14 League members have submitted 15 applications for assistance with their studies, a 25% reduction on last year and a continued reduction over the past two years. Two of these applications were refused. Thus, 13 awards, a decrease of 40%, totalling £9,945.45 (a decrease of 62% on last year) were agreed, of which £6,142.16, has been claimed so far. After offering awards, two of the applicants decided not to claim them. This year the awards were all for work related studies: 5 for conferences, 2 for Doctorates, 5 for Master's, 2 for Diplomas and 1 course.

Our Treasurer has worked tirelessly, for over a year, to set up online banking for the Scholarship Fund, but this has still not been finalised, therefore for the time being we are still having to pay recipients by cheque.

In light of some applicants appearing to have difficulty in completing the online scholarship application forms, this year we have published a short guide in the League News, to assist with the completion of the form. It is disappointing when we have the same answer several times on the form and we have to reject applications when they are not completed in full.

Having updated the Grant Making Policy in the name of good governance, last year, we have experienced a considerable drop in the number of applications received. We have undertaken our annual review of the policy and re-set the sum of money to be allocated for the financial year 2025/2026. We have removed the restriction of only being able to receive awards twice in any five year period and the maximum cap for each award. We are still keen, however, that successful applicants allow themselves the time to practise the knowledge and skills learnt from their studies. Annual review will continue each March.

Recipients' reports on completion of their studies, published in the League News and on the website, continue to provide interest, identifying how new skills and knowledge have impacted practice and/or life. We hope that they will encourage more League members to apply for scholarship assistance whilst also accounting for the use of charitable monies.

We hope that the year ahead will find more League members applying for assistance for both work and non-work-related study and conference attendance. We are keen to assist as many Barts nurses as possible in their studies and plan in the coming year to consider how we can best achieve this. We cannot guarantee that we can always honour the request in full, or indeed to offer ongoing continued support for lengthy courses, but all applications are carefully considered.

Stewart Baines Coltart Scholarship Fund Committee**Annual Report May 2025****May 2024 (3 applications, 3 applicants, 2 awards)****1: 2024/2025 (1985)**

Clinical Nurse Advisor, High Street Chemist: RCN & National Travel Health Network and Centre 7th Joint Travel Health Conference

AWARD NOT CLAIMED

2: 2024/2025 (1979)

Semi retired, part time external verifier/consultant on Healthcare qualifications for City & Guilds: Diploma in Herbal Medicine

APPLICATION REFUSED

3: 2024/2025 (1994)

Enhanced Supportive Care Advanced Nurse Practitioner, Lung Cancer: Multinational Association of Supportive Cancer Care Conference

September 2024 (9 applications, 9 applicants, 8 awards)**4: 2024/2025**

ECMO Specialist Nurse: MSc Medical and Healthcare Education

5: 2024/2025

Senior Lecturer Nursing & Paramedic Sciences, Advanced Nurse Practitioner, Resuscitation Instructor: Doctor of Coaching and Mentoring

6: 2024/2025

Senior Charge Nurse, ITU: MSc Leadership and Service Improvement in Health Care

7: 2024/2025

Lead CNS, Haemato-Oncology: MSc Health and Wellbeing

8: 2024/2025

Family Nurse: Human Givens Diploma Course

9: 2024/2025

Adult Critical Care Unit Staff Nurse: MSc Global Health Management

APPLICATION REFUSED

10: 2024/2025

Advanced Nurse Practitioner, General Practice: Dermoscopy for Intermediates Certificate

11: 2024/2025

Dermatology Lecturer Practitioner/Clinical Nurse Specialist Check4Cancer: MSc Clinical Dermatology at the University of South Wales

12: 2024/2025

Lead Nurse for Clinical Nurse Specialists: Professional Doctorate in Advanced Practice
AWARD NOT CLAIMED

November 2024 (No applications)

March 2025 (3 applications, 3 applicants, 3 awards)

13: 2024/2025

Clinical Nurse Advisor for Superdrug Group: RCN & NaTHNaC 8th Joint Travel Health
Conference

14: 2024/2025

Associate Professor, Adult Nursing: 10th International Clinical Skills Conference

15: 2024/2025

Simulation and Skills Educator: 10th International Clinical Skills Conference

Diana Sherlaw
Honorary Secretary

Alexandra Hayward
Honorary Treasurer

The League of St Bartholomew's Nurses

Benevolent Fund Sub Committee Annual Report

1 May 2024 - 30 April 2025

Madam President and members of the League I am pleased to present the report of the Benevolent Fund subcommittee for the year ending 30 April 2025

While the League continued to celebrate its 125th Anniversary Sir Keir Starmer was elected UK Prime Minister, Donald Trump elected President of the USA and conflict continued in Ukraine and the Middle East. The Paris Olympics took place in what has been recorded as the Earth's warmest summer on record.

I am pleased to report that the market value of our investments managed by Coutts remain in excess of £1m.

Full details of our investments, income and expenditure for the year are printed in the League News having been independently examined by our accountants McLean Reid.

Legacies and donations of £5,650 have been most gratefully received this year.

Over £90,000 has been spent on Gifts and grants and a further £15,700 on printing and posting the League News to our 2000+ members worldwide.

Financial awards have supported physical and mental health needs, mobility and safety issues and have included contributions towards roof repairs, a new boiler, stairlifts, physio and speech therapy services, convalescence, taxi fares, winter fuel allowances and emergency grants arising from a variety of unexpected events.

As part of the 125th League celebrations shortbread biscuits were posted as a small gift to the 77 housebound members known to the committee who were unable to travel to any of the Regional events which were held and 12 previous League Committee members were welcomed as our guests at the 2024 ADM in recognition of their contribution to the League.

58 bouquets of flowers were dispatched to members for a variety of reasons including illness, following surgery, in sympathy and in celebration of life events including birthday flowers to 5 members aged 100 years and over.

Christmas cards, personally signed by our President, were sent to over 500 members qualified 60 years and more with a gift of postage stamps for those living in the UK.

Letters were also sent to those members who qualified 60 years ago in 1965 reminding them of the scope of the Benevolent fund and offering help if needed.

It is wonderful to receive thank you letters and news from members around the world appreciating how significant a card or bouquet of flowers can be as well as a major award.

After careful consideration of the declining number of requests for a League Country Wide Network visitor and the complexity of implementing current National safeguarding policies

and procedures the Network has now been discontinued with many thanks to all those who have been involved over the years.

The committee has met 5 times during the year in person and/or on Teams with many informal contacts in between and on your behalf I would like to thank them all for their time, expertise and commitment to managing the Benevolent fund and ensuring its charitable objects are met.

A particular thank you to Mary Elliott who retired from the committee after 6 years and we welcome Jo Carroll in her place.

Finally, it is not always easy to ask for help but please don't hesitate.

If you, or someone you know is in need great or small for any reason please contact in complete confidence the Benevolent Secretary, Susie Merry, who is only an email (Benev.secretary@bartsleagueofnurses.org)

or phone call away (07873 402814)

Jill Gillett. Hon Treasurer

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST BARTHOLOMEWS NURSES

England & Wales - Charity number 275165

Accounts

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2024

Charity Number : 275165

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CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

TRUSTEES' ANNUAL REPORT FOR THE YEAR ENDED 30 APRIL 2024

Reference and administration details

Registered charity number: 275165

Charity's principle address: The Post Room, St. Bartholomew's Hospital
West Smithfield, London EC1A 7BE

Names of Charity Trustees who manage the charity:

Mrs E Wood-Dow OBE	President of the League
Mrs N Marks	Honorary General Secretary
Mrs R E Campbell	Honorary Treasurer
Mrs S Merry	Honorary Secretary – Benevolent Fund
Mrs J Gillett (Chair)	Honorary Treasurer – Benevolent Fund
Miss D Sherlaw	Honorary Secretary – Stewart Baines Coltart Scholarship Fund
Mrs A Hayward	Honorary Treasurer – Stewart Baines Coltart Scholarship Fund

Dame Nancy Hallett External adviser to the Trustees

All Trustees have Honorary roles.

Structure, governance and management

The League is governed by a constitution document and is managed by the League Executive Committee. The constitution was last revised and updated in 2022 and such changes agreed at the Annual General Meeting in October 2022. Honorary Officers are elected every three years; the President serves a five-year term of office and may be re-elected for a second term. The Trustees have met twice this year and can confirm that they are cognisant of the Charity Commission's guidance on public benefit.

Objectives and activities

The objects of the League are:

1. To further the best interests of nursing and the nursing profession.
2. To afford mutual help and to promote social interaction.
3. To promote and maintain a Benevolent Fund for the benefit of League members and St. Bartholomew's nurses who trained prior to September 1993.
4. To promote and maintain Scholarship Funds for the benefit of League members.

In accordance with the constitution, the Benevolent Fund is available to provide assistance not only to League members, but also to any nurse who trained at St. Bartholomew's Hospital or who qualified as a nurse at St. Bartholomew's School of Nursing and Midwifery prior to September 1993. The sub-committee, which administers the Fund on behalf of the League, is concerned to give assistance to those who are going through periods of hardship. The sub-committee welcomes all applications and enquiries and meets six times a year, but urgent requests are considered throughout the year. Meetings are either virtual on zoom or hybrid, being held in person with some members attending remotely. The Countrywide Network of Friendship facilitates local visits to members who would appreciate support and friendship.

The Scholarship Fund financially assists members of the League with course and conference fees and associated costs of study. A sub-committee administers the fund and meets four times a year to consider applications for assistance with funding. Meetings are either virtual on zoom or hybrid, being held in person with some members attending remotely.

In line with the Charity Commission good practice recommendations, the Trustees have developed a Charity Governance Code Assessment document, Risk Management and Financial Control strategies, an Asset Register and policies for Conflict of Interest, Investment, Charitable Funds management, Grant Making, Social Media, Equality Diversity and Inclusivity, Recruitment, Privacy, Expenses, Anti bribery and Complaints and Feedback. All League

policies are available on request. The Grant Making Policy for both Benevolent and Scholarship funds and the Investment policy were reviewed this year and ratified by the Trustees.

Achievement and performance

The Benevolent Fund has provided funds, including emergency assistance, for the relief of physical, mental, social and emotional needs arising from any disadvantage. The Countrywide Network of Friendship has continued to contact those who need help and support and to ensure that practical and/or financial resources are offered. Afternoon teas were held across the UK and abroad as part of the 900th celebrations of St Bartholomew's Hospital enabling many members to come together at local venues while cream teas were delivered by post to many other housebound members,

The League Scholarship Fund has supported members in professional studies in order to enhance their skills and knowledge for the benefit of the organisations for which members work and, in turn, for the patients and communities they serve. The Fund has also supported League members in a wide range of other studies that provide opportunities for personal development and transferable skills. Details of achievements and performance of the Benevolent Fund and Scholarship Fund are published annually in the League News and presented to the Annual General Meeting. Some beneficiaries are resident outside England and Wales, but transfer of money was through the regulated banking system.

Trustee Indemnity Insurance has been purchased as the Trustees recognise their responsibility to protect the Charity's assets and resources.

No serious incidents have occurred during the current year.

Financial Review

The Trustees' policy is to build satisfactory levels of funds to provide a secure base for the fulfilment of the charitable objectives. Investments are managed by Coutts Charity Investment Team who provide quarterly investment reports and attend a Trustee meeting to present an annual investment performance review. No grant funding from central government or local authority is received and during the current year no income has been received from outside the UK. No Trustee has received remuneration other than expenses incurred.

Declaration

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

Signed on behalf of the Charity's Trustees:



Jill Gillett
Chair of Trustees
Dated: 3rd July 2024

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2024

Charity Number : 275165

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

Independent examiner's report to the trustees of the Charities in Association with the League of St. Bartholomew's Nurses

I report to the charity trustees on my examination of the accounts of the Charities in Association with the League of St. Bartholomew's Nurses for the year ended 30 April 2024.

Responsibilities and basis of report

As the charity trustees of the Charitable Funds 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 Charitable Funds' accounts carried out under section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charitable Funds as required by section 130 of the Act; or
2. the accounts do not accord with the accounting records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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



J.R.Champion FCA
McLean Reid
Chartered Accountants & Registered Auditors
1 Forstal Road
Aylesford
Kent
ME20 7AU

Date: 18th July 2024

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

CONSOLIDATED STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2024

	Benevolent Fund (pages 6 to 7) £	Stewart Baines Coltart Scholarship Fund (pages 8 to 9) £	2024 Total £	2023 Total £
Receipts				
Donations, legacies and other similar receipts				
Donations & legacies	9500	7500	17000	70899
Tax reclaim on gift aid donations	29	-	29	550
Grants returned	-	1000	1000	-
Investment income receipts				
Income from investments	21179	6925	28104	28605
Deposit account interest	969	222	1191	879
Income from Trust funds	-	-	-	-
Receipts from sale of investments	52265	5744	58009	353908
TOTAL RECEIPTS	83942	21391	105333	454841
Payments				
Charitable payments				
Grants paid	71836	26161	97997	91986
Management and administration	5641	805	6446	4419
Other expenditure				
Purchase of investments	-	-	-	365182
League News costs	16659	-	16659	16029
TOTAL PAYMENTS	94136	26966	121102	477616
Net (payments)	(10194)	(5575)	(15769)	(22775)
<i>Cash funds last year end</i>	<i>74874</i>	<i>21698</i>	<i>96572</i>	<i>119347</i>
Cash funds this year end	64680	16123	80803	96572

CONSOLIDATED STATEMENT OF ASSETS AND LIABILITIES FOR THE YEAR ENDED 30 APRIL 2024

	Benevolent Fund (pages 6 to 7) £	Stewart Baines Coltart Scholarship Fund (pages 8 to 9) £	2024 Total £	2023 Total £
Cash funds				
Bank deposit account	62867	15622	78489	93885
Bank current account	1810	500	2310	2685
Cash in hand	3	1	4	2
	64680	16123	80803	96572
Investment assets				
Investments at cost	1466303	497995	1964298	2021137
Investments at market value	1545016	519572	2064588	1929985

It is the Trustees' policy to accumulate sufficient funds to realise the Trust Deed objectives. All funds are unrestricted.

BENEVOLENT FUND

STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2024

	Note	2024 £	2023 £
Receipts			
Donations, legacies and other similar receipts			
Donations		9500	2360
Legacies		-	29331
Tax reclaims on gift aid donations	2	29	550
Investment income receipts			
Income from investments		21179	21365
Deposit account interest		969	699
Other receipts			
Receipts from sale of investments		<u>52265</u>	<u>325437</u>
TOTAL RECEIPTS		<u>83942</u>	<u>379742</u>
Payments			
Charitable payments			
Grants & gifts paid		71836	56618
Publication of League News		10062	9880
League News postage & stationery costs		6597	6149
Management and administration	5	5641	3803
Other expenditure			
Purchase of investments		-	333596
		<u>94136</u>	<u>410046</u>
Net (payments)		(10194)	(30304)
<i>Cash funds last year end</i>		<u>74874</u>	<u>105178</u>
Cash funds this year end		<u>64680</u>	<u>74874</u>

STATEMENT OF ASSETS AND LIABILITES AS AT 30 APRIL 2024

	Note	2024 £	2023 £
Cash funds			
Bank deposit account		62867	72687
Bank current account		1810	2185
Cash floats	6	<u>3</u>	<u>2</u>
		<u>64680</u>	<u>74874</u>
Investment assets			
Investments at cost	7	<u>1466303</u>	<u>1517116</u>
Investments at market value	7	<u>1545016</u>	<u>1452705</u>

BENEVOLENT FUND

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2024

1. Accounting basis

These accounts have been prepared using the "receipts and payments basis" and comply with section 133 of the Charities Act 2011.

2. Income tax recovery

The Benevolent Fund has received income tax refunds totalling **£29** (2023: £550) during the year. This represents income tax reclaimed on gift aid donations received during the tax year to 5th April 2023.

3. Accountancy charges

The Benevolent Fund has paid accountancy charges of **£1380** (2023: £1380) to The League of St. Bartholomew's Nurses General Fund in respect of the share of accountancy charges for the year ended 30th April 2023. This sum is shown as part of the "management and administration" cost in the accounts.

4. Stockbroker fees

Included in "management and administration" costs is **£2265** (2023: £1184) relating to the administration costs incurred by Coutts.

These sums are shown as part of the "management and administration" cost in the accounts.

5. Management and administration costs

Along with the expenditure noted in 3) and 4) above, these costs also include the cost of trustee meetings along with office and communication costs.

6. Cash floats

Included in the cash float is a figure of **£3** (2023: £2) held by the Stockbrokers.

7. Investments

	Nominal	Cost	Market value
		£	£
CMAF Global Balanced	1371408 units	1466303	1545016
Total as at 30th April 2024		1466303	1545016

APPROVAL OF ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2024

I approve the statement of receipts and payments, statement of assets and liabilities and notes on pages 6 and 7 and confirm that I have made available all relevant records and information for their preparation.



Jill Gillett
Hon. Treasurer
3rd July 2024

STEWART BAINES COLTART SCHOLARSHIP FUND

STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2024

	Note	2024 £	2023 £
Receipts			
Donations, legacies and other similar receipts			
Donations received		-	100
Legacies received		7500	39108
Investment income receipts			
Income from investments		6925	7240
Deposit account interest		222	180
Income from JG Hammond Trust		-	-
Other receipts			
Receipts from sale of investments		5744	28471
Awards returned		1000	-
TOTAL RECEIPTS		<u>21391</u>	<u>75099</u>
Payments			
Charitable payments			
Grants paid		26161	35368
Management and administration	2	805	616
Share of accountancy fees	3	-	-
Other expenditure			
Purchase of investments		-	31586
TOTAL PAYMENTS		<u>26966</u>	<u>67570</u>
Net receipts (payments)		(5575)	7529
<i>Cash funds last year end</i>		<u>21698</u>	<u>14169</u>
Cash funds this year end		<u>16123</u>	<u>21698</u>

STATEMENT OF ASSETS AND LIABILITIES AS AT 30 APRIL 2024

	Note	2024 £	2023 £
Cash funds			
Bank deposit account		15622	21198
Bank current account		500	500
Cash floats	4	1	-
		<u>16123</u>	<u>21698</u>
Investment assets			
Investments at cost	5	<u>497995</u>	<u>503964</u>
Investments at market value	5	<u>519572</u>	<u>477280</u>

STEWART BAINES COLTART SCHOLARSHIP FUND

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2024

1. Accounting basis

These accounts have been prepared using the "receipts and payments basis" and comply with section 133 of the Charities Act 2011.

2. Management and administration

The Stewart Baines Coltart Scholarship Fund has paid administration charges from Coutts totalling **£744** (2023: £403).

3. Accountancy charges

The Stewart Baines Coltart Scholarship Fund has paid accountancy charges of **£nil** (2023: *£nil*) to The League of St. Bartholomew's Nurses General Fund in respect of the share of accountancy charges for the year ended 30th April 2023.

4. Cash floats

Included in the cash float is a figure of **£1** (2023: *£nil*) held by the Stockbrokers.

5. Investments

	Units	2024		2023	
		Market Value £	Cost £	Market Value £	Cost £
Equator ICAV Coutts Multi Asset Global Balanced Fund	461190	519572	497995	477280	503964
		519572	497995	477280	503964

APPROVAL OF ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2024

I approve the statement of receipts and payments, statement of assets and liabilities on page 8 and the notes above and confirm that I have made available all relevant records and information for their preparation.



Alexandra Hayward
Hon. Treasurer
3rd July 2024

The League of St Bartholomew's Nurses

Benevolent Fund Sub Committee Annual report 2024

Madam President and members of the League I am pleased to present the report of the Benevolent Fund subcommittee for the year ending 30 April 2024

At the beginning of our financial year in May 2023 we celebrated the Coronation of King Charles 111 and Barts's 900th celebrations were well under way, financial markets had stabilised but the increase in the cost of living remained challenging. War continued in Ukraine and later in the year conflict arose again in the Middle East. In the UK continued strikes by Doctors and railway workers disrupted national services and daily life.

The Benevolent committee kept calm and carried on.

I am pleased to report that the market value of our investments managed by Coutts remain in excess of £1m.

Full details of our investments, income and expenditure for the year are printed in the League News having been independently examined by our accountants McLean Reid.

Legacies and donations of £9,500 have been most gratefully received this year.

Over £70,000 has been spent on Gifts and grants and a further £16,600 on printing and posting the League News to our 2500+ members worldwide.

Gifts have supported physical and mental health needs, mobility and safety issues and have included roof repairs, replacement windows, a repaired garden path, electric scooters, electric wheelchair, stairlift repair, an ipad, medical consultations and investigations, physio and speech therapy services, convalescence, taxi fares, and emergency grants arising from a variety of unexpected events.

As part of the 900th celebrations "cream teas for 2", so members could invite a friend, were sent by post in May/June to 77 housebound members unable to travel to one of the many parties held during the summer tea party season.

56 bouquets of flowers were dispatched to members for a variety of reasons including illness, following surgery, in sympathy and in celebration of life events.

Christmas cards, personally signed by our President, were sent to over 500 members qualified 60 years or more with a gift of postage stamps for those living in the UK and a Barts Nurse rose keyring to those living abroad.

Letters were also sent to those members who qualified 60 years ago in 1964 reminding them of the scope of the Benevolent fund and offering help if needed.

It is wonderful to receive and share thank you letters and news from members around the world appreciating how significant a card or bouquet of flowers can be as well as a major gift. Many of these can be read in the League News and on the website.

The Country wide network of friendship continues to find visitors for members on request. These visits are much appreciated and are often supplemented with telephone calls.

It goes almost without saying that committee members have worked tremendously hard to achieve all this, at the 6 official meetings during the year in person or on zoom as well as between meetings and on your behalf thank you to all of them.

Additionally, an individual thankyou to Sue Finney who retired in October as Countrywide network co-ordinator after 8 years. In her place we welcome Rosie Clasby.

A special thank you also to Hilary Mathews who retired as Benevolent secretary also in October after 9 years having already served on the Benevolent committee and previously also on the Executive. We welcome Susie Merry in her place.

The Grant Making Policy was reviewed and updated by the committee and ratified by the Trustees in April. This is available on the website or on request.

It is not always easy to ask for help but please don't hesitate. If you, or you know someone, who is in need great or small for any reason please contact in complete confidence the Benevolent Secretary who is only an email (Benev.secretary@bartsleagueofnurses.org)

Or a phone call away (07873 402814)

Jill Gillett. Hon Treasurer



Scholarship Committee Annual Report May 2024

The Stewart Baines Coltart Scholarship Fund

Registered Charity 275165

Madam President and members of the League, I have great pleasure in presenting the Annual Report of the Stewart Baines Coltart Scholarship Fund Committee for the financial year ending 30th April 2024.

The Scholarship Fund continues to provide fully paid-up League members with financial assistance to help enhance life, career and retirement, by supporting study and associated costs for courses and conferences.

The committee has met on four occasions over the past year. We have attempted running hybrid meetings with varying success, mainly due to IT issues in the room we now use for our meetings following closure of the North Wing. My continued thanks are due to our committee members who have been patient and helpful with our new processes.

The committee consists of six League members who serve for three or six years in addition to an Honorary Secretary and Treasurer as well as Honorary Officers and Trustees. The committee member job description suggests a 75% attendance at meetings either virtually or in person and this has been achieved. Two of our number have finished their terms of office on the committee and we have welcomed their replacements: Angela Robinson and Julia Moore, who have settled into their roles. If any League members are interested in serving on the committee, please don't hesitate to contact the Honorary Secretary for more information.

This year, 19 League members have submitted 20 applications for assistance with their studies, a reduction of 28% on last year. Four of these applications were refused, for various reasons, or more information was requested and one applicant found funding from their employer after our discussions. Thus, 15 awards, totalling £26,325, were agreed, of which £19,141.10 has been claimed. The awards are for a variety of educational programmes and courses. Three were for non-healthcare related programmes, two for complementary courses and one for a trip overseas to deliver palliative care training.

We have continued to spend considerable time over the year perfecting the scholarship application form, available on the website under "Request our help". We have attempted to make it more user friendly as well as reducing the need for chasing and investigation in order to facilitate useful discussion at our meetings. However, I have to report that it is not unusual to have to contact the applicants for clarification and it may become necessary to reject forms not fully completed.

During the year the committee has updated the Grant Making Policy and the committee member job description. We set up a task force to look into ensuring an ongoing supply of funding of scholarship awards to applicants, which is administered fairly, within the charity objectives. Good governance means funds should be distributed to current League members as well as being there for future members. This means that we have identified a sum of money to be allocated for the financial year 2024/2025. The figure will be reviewed each March and the amount for the forthcoming year will be agreed. Applicants may continue to apply repeatedly but will only be the recipient of an award twice in any five year period,

thereby allowing successful applicants the time to practise the knowledge and skills learnt. Although this will start from May 2024, all previous applications will not be counted. The maximum award sum of £1000 will be available per application during 2024/2025.

We ask all recipients to submit a report on the completion of their studies or attendance at the conference, which is published in the League News and occasionally on the website. These serve to identify how new skills and knowledge have impacted their practice and/or their life, as well as to account for the use of charitable monies and to encourage more League members to apply for scholarship assistance.

We hope that more League members will continue to apply for assistance with their studies and conference attendance, for both work and non-work-related study. We cannot guarantee that we can always honour the request in full, or indeed to offer ongoing continued support for lengthy courses, but all applications are carefully considered.

We look forward to the year ahead and to being able to assist more League members with a variety of studies and conferences.

May 2023 (6 applications, 6 applicants, 5 awards)

1: 2023/2024

Critical Care Bank Nurse: MSc Public Health - Health Economics Stream, London School of Hygiene and Tropical Medicine
APPLICATION REFUSED

2: 2023/2024

Charge Nurse, Adult Critical Care: Post Graduate Diploma Leadership and Service Improvement in Health Care - London South Bank University

3: 2023/2024

Sister, Intensive Care: Cardiovascular and Respiratory Health Care MSc

4: 2023/2024

Paediatric Critical Care Outreach Nurse: Paediatric Advanced Clinical Assessment Course – Evelina London
NOT CLAIMED, EMPLOYER FUNDED COURSE

5: 2023/2024

Lecturer in Nursing: Trip to Sierra Leone to deliver palliative care/leadership training programme

6: 2023/2024

Senior Lecturer for Paramedic and Nursing Sciences & Advanced Practitioner for 111 Service: Doctorate in Coaching & Mentoring @ Oxford Brookes University

September 2023 (4 applications, 4 applicants, 5 awards)

7: 2023/2024

Learning and Development Lead Facilitator: Train the Trainer Advanced Communication Skills Facilitator Training

8: 2023/2024

Emergency Department Sister: MSc Advanced Clinical Practice

9: 2023/2024

Emergency Nurse Practitioner: MSc Advanced Clinical Practice

10: 2023/2024

Palliative Care Clinical Nurse Specialist: MSc Advanced Clinical Practice

November 2023 (4 applications, 4 applicants, 3 awards)

11: 2023/2024

Self employed Counsellor and Psychotherapist in Private Practice: Barnardos Certificate in Adoption Support Counselling

12: 2023/2024

Volunteer Support Group Facilitator: CRUSE Grief First Aid Training

13: 2023/2024

Part time external verifier for City & Guilds: Association of Naturopathic Practitioners Diploma in Iridology
MORE INFORMATION REQUIRED

14: 2023/2024

Part time Community Bank Nurse: Royal Agricultural University Foundation Degree in Animal Welfare, Behaviour and Conservation

March 2024 (6 applications, 6 applicants, 4 awards)

15: 2023/2024

Junior Sister Adult Critical Care Unit, Student Key Practice Assessor, Lecturer: Advanced Life Support, Resuscitation Council
APPLICATION REFUSED

16: 2023/2024

Diabetes Educator, Derbyshire Community Health Services NHS: X-PERT Health & Wellbeing Training Course, Level 3 at the Personalised Care Institute

17: 2023/2024

Semi retired, part time external verifier/consultant on Healthcare qualifications for City & Guilds: Diploma in Herbal Medicine
FURTHER INFORMATION REQUESTED WITH A VIEW TO REDISCUSSION IN MAY 2024

18: 2023/2024

Nurse Cadet Advisor, Royal College of Nursing Prince of Wales Nursing Cadet Scheme:
Masters in Education at Quality Improvement Glyndŵr University

19: 2023/2024

External Nurse Trainer, Epilepsy Society: MSc in Nursing Studies at University of Sunderland

20: 2023/2024

Advanced Nurse Practitioner in GP Surgery: Professional Doctorate in Health at University of Central Lancashire

**Diana Sherlaw
Honorary Secretary**

**Alexandra Hayward
Honorary Treasurer**

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST BARTHOLOMEWS NURSES

England & Wales - Charity number 275165

Accounts

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2023

Charity Number : 275165

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CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

TRUSTEES' ANNUAL REPORT FOR THE YEAR ENDED 30 APRIL 2023

Reference and administration details

Registered charity number: 275165

Charity's principle address: The Post Room, St. Bartholomew's Hospital, West Smithfield, London EC1A 7BE

Names of Charity Trustees who manage the charity:

Mrs E Wood-Dow OBE	President of the League
Mrs N Marks	Honorary General Secretary
Mrs R E Campbell	Honorary Treasurer
Mrs H Mathews	Honorary Secretary – Benevolent Fund
Mrs J Gillett	Honorary Treasurer – Benevolent Fund
Miss D Sherlaw (Chair)	Honorary Secretary – Stewart Baines Coltart Scholarship Fund
Mrs A Hayward	Honorary Treasurer – Stewart Baines Coltart Scholarship Fund

Dame Nancy Hallett External adviser to the trustees

All Trustees are Honorary roles.

Structure, governance and management

The League is governed by a constitution document and is managed by the League Executive Committee. The constitution was last revised and updated in 2022 and such changes agreed at the Annual General Meeting in October 2022. Honorary Officers are elected every three years; the President serves a five-year term of office and may be re-elected for a second term. The Trustees have met, virtually, twice this year and can confirm that they are cognisant of the Charity Commission's guidance on public benefit.

Objectives and activities

The objects of the League are:

1. To further the best interests of nursing and the nursing profession.
2. To afford mutual help and to promote social interaction.
3. To promote and maintain a Benevolent Fund for the benefit of League members and St. Bartholomew's nurses who trained prior to September 1993.
4. To promote and maintain Scholarship Funds for the benefit of League members.

In accordance with the constitution, the Benevolent Fund is available to provide assistance not only to League members, but also to any nurse who trained at St. Bartholomew's Hospital or who qualified as a nurse at St. Bartholomew's School of Nursing and Midwifery prior to September 1993. The sub-committee, which administers the Fund on behalf of the League, is concerned to give assistance to those who are going through periods of hardship. The sub-committee welcomes all applications and enquiries and meets six times a year, but urgent requests are considered throughout the year. Meetings are now being held in person with some members attending remotely. The League is currently considering holding half of the meetings as hybrid and half virtually in future. The Countrywide Network of Friendship facilitates local visits to members who would appreciate support and friendship. The Scholarship Fund financially assists members of the League with course and conference fees and associated costs of study. A sub-committee administers the fund and meets four times a year to consider applications for assistance with funding. The League is currently considering holding half of the meetings as hybrid and half virtually in future.

In line with the Charity Commission good practice recommendations, the Trustees have developed a Charity Governance Code Assessment document, Risk Management and Financial Control strategies, an Asset Register and policies for Conflict of Interest, Investment, Charitable Funds management, Grant Making, Social Media, Equality and Diversity, Recruitment, Privacy, Expenses, Anti bribery and Complaints and Feedback. All League policies are available on request.

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

TRUSTEES' ANNUAL REPORT FOR THE YEAR ENDED 30 APRIL 2023 (Continued.....)

Achievement and performance

In achieving the objects of the charities, the Trustees have been mindful of the Public Benefit requirement of the Charity Commission with particular regard to the advancement of education and the relief of financial hardship or other disadvantage. The Benevolent Fund has provided funds for the relief of poverty and has also provided specific items and care for those who are disadvantaged by age, ill health, disability, financial hardship or other disadvantage. The Countrywide Network of Friendship seeks to contact those who need help and support and to ensure that practical and/or financial resources are offered. League Regional Networks are well established in three regions enabling members to get together for social events that are closer to home. These get-togethers have been highly successful, and it is hoped that more networks will be established in the future. As St Bartholomew's Hospital celebrates its 900th anniversary in 2023, more regional events are planned throughout the year.

The League Scholarship Fund has supported members in professional studies in order to enhance their skills and knowledge for the benefit of the organisations for which members work and, in turn, for the patients and communities they serve. The Fund has also supported League members in a wide range of other studies that provide opportunities for personal development and transferable skills. Details of achievements and performance of the Benevolent Fund and Scholarship Fund are published annually in the League News and presented to the Annual General Meeting. Some beneficiaries are resident outside England and Wales, but transfer of money was through the regulated banking system.

Trustee Indemnity Insurance has been purchased as the Trustees recognise their responsibility to protect the Charity's assets and resources.

No serious incidents have occurred during the current year.

Financial Review

The Trustees' policy is to build satisfactory levels of funds to provide a secure base for the fulfilment of the charitable objectives. Coutts Charity Investment Team now provide professional advice on investment management. Regular virtual attendance at Trustee meetings to report on investments against the background of world financial events has taken place. No grant funding from central government or local authority is received and during the current year no income has been received from outside the UK. No Trustees have received remuneration other than expenses incurred.

Declaration

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

Signed on behalf of the Charity's Trustees:



Diana Sherlaw
Chair of Trustees
Dated: 14th July 2023

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2023

Charity Number : 275165

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

Independent examiner's report to the trustees of the Charities in Association with the League of St. Bartholomew's Nurses

I report to the charity trustees on my examination of the accounts of the Charities in Association with the League of St. Bartholomew's Nurses for the year ended 30 April 2023.

Responsibilities and basis of report

As the charity trustees of the Charitable Funds 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 Charitable Funds' accounts carried out under section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charitable Funds as required by section 130 of the Act; or
2. the accounts do not accord with the accounting records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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



J.R.Champion FCA
McLean Reid
Chartered Accountants & Registered Auditors
1 Forstal Road
Aylesford
Kent
ME20 7AU

Date: 17th July 2023

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

CONSOLIDATED STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2023

	Benevolent Fund (pages 6 to 7) £	Stewart Baines Coltart Scholarship Fund (pages 8 to 9) £	2023 Total £	2022 Total £
Receipts				
Donations, legacies and other similar receipts				
Donations & legacies	31691	39208	70899	3290
Tax reclaim on gift aid donations	550	-	550	6
Grants returned	-	-	-	-
Investment income receipts				
Income from investments	21365	7240	28605	83747
Deposit account interest	699	180	879	36
Income from Trust funds	-	-	-	-
Receipts from sale of investments	325437	28471	353908	1917313
TOTAL RECEIPTS	379742	75099	454841	2004392
Payments				
Charitable payments				
Grants paid	56618	35368	91986	105405
Management and administration	3803	616	4419	17666
Other expenditure				
Purchase of investments	333596	31586	365182	1866814
League News costs	16029	-	16029	14528
TOTAL PAYMENTS	410046	67570	477616	2004413
Net receipts/(payments)	(30304)	7529	(22775)	(21)
<i>Cash funds last year end</i>	<i>105178</i>	<i>14169</i>	<i>119347</i>	<i>119368</i>
Cash funds this year end	74874	21698	96572	119347

CONSOLIDATED STATEMENT OF ASSETS AND LIABILITIES FOR THE YEAR ENDED 30 APRIL 2023

	Benevolent Fund (pages 6 to 7) £	Stewart Baines Coltart Scholarship Fund (pages 8 to 9) £	2023 Total £	2022 Total £
Cash funds				
Bank deposit account	72687	21198	93885	105356
Bank current account	2185	500	2685	13487
Cash in hand	2	-	2	504
	74874	21698	96572	119347
Investment assets				
Investments at cost	1517173	503964	2021137	1839598
Investments at market value	1452705	477280	1929985	2016110

It is the Trustees' policy to accumulate sufficient funds to realise the Trust Deed objectives. All funds are unrestricted.

BENEVOLENT FUND

STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2023

	Note	2023 £	2022 £
Receipts			
Donations, legacies and other similar receipts			
Donations		2360	1590
Legacies		29331	1700
Tax reclaims on gift aid donations	2	550	6
Investment income receipts			
Income from investments		21365	61172
Income from JG Hammond Trust		-	-
Deposit account interest		699	3
Other receipts			
Transfer from Scholarship Funds		-	725
Receipts from sale of investments		325437	1410558
TOTAL RECEIPTS		379742	1475784
Payments			
Charitable payments			
Grants & gifts paid		56618	73534
Publication of League News		9880	9106
League News postage & stationery costs		6149	5422
Management and administration	5	3803	12127
Other expenditure			
Purchase of investments		333596	1361763
		410046	1461952
Net (payments)/receipts		(30304)	13832
<i>Cash funds last year end</i>		105178	91346
Cash funds this year end		74874	105178

STATEMENT OF ASSETS AND LIABILITES AS AT 30 APRIL 2023

	Note	2023 £	2022 £
Cash funds			
Bank deposit account		72687	92191
Bank current account		2185	12987
Cash floats	6	2	-
		74874	105178
Investment assets			
Investments at cost	7	1517173	1341965
Investments at market value	7	1452705	1516663

BENEVOLENT FUND

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2023

1. Accounting basis

These accounts have been prepared using the "receipts and payments basis" and comply with section 133 of the Charities Act 2011.

2. Income tax recovery

The Benevolent Fund has received income tax refunds totalling **£550** (2022: £6) during the year. This represents income tax reclaimed on gift aid donations received during the tax year to 5th April 2022.

3. Accountancy charges

The Benevolent Fund has paid accountancy charges of **£1380** (2022: £1220) to The League of St. Bartholomew's Nurses General Fund in respect of the share of accountancy charges for the year ended 30th April 2022. This sum is shown as part of the "management and administration" cost in the accounts.

4. Stockbroker fees

Included in "management and administration" costs is **£1184** (2022: £8195) relating to the administration costs incurred by Coutts (2022: Ravenscroft).

During the year, the charity changed its stockbrokers from Vartan Ravenscroft to Coutts. This incurred a transfer fee of £1,500 in the 2022 accounts.

These sums are shown as part of the "management and administration" cost in the accounts.

5. Management and administration costs

Along with the expenditure noted in 3) and 4) above, these costs also include the cost of trustee meetings along with office and communication costs.

6. Cash floats

Included in the cash float is a figure of **£2** (2022: £nil) held by the Stockbrokers.

7. Investments

	Nominal	Cost	Market value
		£	£
CMAF Global Balanced	1418934 units	1517173	1452705
Total as at 30th April 2023		1517173	1452705

APPROVAL OF ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2023

I approve the statement of receipts and payments, statement of assets and liabilities and notes on pages 6 and 7 and confirm that I have made available all relevant records and information for their preparation.



Jill Gillett
Hon. Treasurer
14th July 2023

STEWART BAINES COLTART SCHOLARSHIP FUND

STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2023

	Note	2023 £	2022 £
Receipts			
Donations, legacies and other similar receipts			
Donations received		100	-
Legacies received		39108	-
Investment income receipts			
Income from investments		7240	22575
Deposit account interest		180	3
Income from JG Hammond Trust		-	-
Other receipts			
Receipts from sale of investments		28471	506755
Awards returned		-	-
TOTAL RECEIPTS		75099	529333
Payments			
Charitable payments			
Grants paid		35368	31871
Management and administration	2	616	4319
Share of accountancy fees	3	-	1220
Other expenditure			
Transfer to Benevolent Fund		-	725
Purchase of investments		31586	505051
TOTAL PAYMENTS		67570	543186
Net receipts (payments)		7529	(13853)
<i>Cash funds last year end</i>		<u>14169</u>	<u>28022</u>
Cash funds this year end		21698	14169

STATEMENT OF ASSETS AND LIABILITIES AS AT 30 APRIL 2023

	Note	2023 £	2022 £
Cash funds			
Bank deposit account		21198	13165
Bank current account		500	500
Cash floats		-	504
		<u>21698</u>	<u>14169</u>
Investment assets			
Investments at cost	4	<u>503964</u>	<u>497633</u>
Investments at market value	4	<u>477280</u>	<u>499447</u>

STEWART BAINES COLTART SCHOLARSHIP FUND NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2023

1. Accounting basis

These accounts have been prepared using the "receipts and payments basis" and comply with section 133 of the Charities Act 2011.

2. Management and administration

The Stewart Baines Coltart Scholarship Fund has paid administration charges from Coutts totalling **£403** (2022: **£690**).

3. Accountancy charges

The Stewart Baines Coltart Scholarship Fund has paid accountancy charges of **£nil** (2022: **£1220**) to The League of St. Bartholomew's Nurses General Fund in respect of the share of accountancy charges for the year ended 30th April 2022.

4. Investments

Equator ICAV Coutts Multi Asset Global Balanced Fund

	Units	2023		2022	
		Market Value £	Cost £	Market Value £	Cost £
	466713	477280	503964	469291	472005
		477280	503964	499447	497633

APPROVAL OF ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2023

I approve the statement of receipts and payments, statement of assets and liabilities on page 8 and the notes above and confirm that I have made available all relevant records and information for their preparation.



Alexandra Hayward
Hon. Treasurer
14th July 2023

League of St Bartholomew's Nurses

Benevolent Fund Committee report year ending 30 April 2023

Madam President and members of the League I am pleased to present the report of the Benevolent Fund subcommittee for the year ending 30 April 2023.

At the beginning of our financial year in May 2022 Covid had abated and instead war was being waged in Ukraine. Energy prices soared and a national cost of living crisis was declared with rising inflation and interest rates. Strikes made travel difficult and frustrated other public servants who

have also taken strike action this year.

2022 was apparently the worst year for investors since 1974 but thanks to our Global Balanced Fund managed by Coutts the market value of our investments remain in excess of £1m.

Full details of our investments, income and expenditure for the year are printed in the League News having been independently examined by our accountants McLean Reid.

Legacies and donations in excess of £30,000 have been most gratefully received this year.

Almost £57,000 has been spent on Gifts and grants and a further £16,000 on printing and posting the League News to our 2000+ members worldwide. At approximately £6.80 a copy including postage the League News is remarkable value.

Gifts have included an electric scooter, electric wheelchair, stairlift repair, bathroom adaptations, medical consultations and investigations, physio and speech therapy services, taxi fares, a personal alarm, an air conditioning unit and emergency grants arising from unexpected events.

53 bouquets of flowers were dispatched to members for a variety of reasons including illness, following surgery, in sympathy and in celebration of life events. For example 6 of our members were over 100 years of age this year.

Christmas cards, personally signed by our President, were sent to over 450 members qualified 60 years or more with a gift of postage stamps for those living in the UK and a bookmark to those living abroad.

Letters were also sent to the 58 members who qualified 60 years ago in 1963 reminding them of the scope of the Benevolent fund and offering help if needed.

It is wonderful to receive and share thank you letters and news from members around the world appreciating how significant a bouquet of flowers or a card can be as well as a major gift. Many of these can be read in the League News and on the website,

The Country wide network of friendship organised by Sue Finney continues to find visitors for members on request. These visits are so appreciated and often supplemented with telephone calls.

It goes almost without saying that the committee joined by new members Alex Broadey, Jackie Murray and Deborah Wheeler have worked hard to achieve all this, officially meeting 6 times during the year efficiently organised by secretary Hilary Mathews and I would like to thank them on your behalf for all that they do.

The Benevolent fund has always been an integral part of the League since its inception in 1899.

Isla Stewart, Matron, considered the Benevolent fund scheme quote “as the most important part of the agenda” at the General Meeting in 1900. She said that “difficulties may come to any of us and we may not be able to face them unaided but they may be lightened when we know our Association has provided the means to help us. (source In Celebration of a Century – Rosemary Bailey)

Remarkably this principle hasn’t changed and the Benevolent fund continues to provide help when needed “to lighten the load “as envisaged over a century ago by the foresight of Miss Stewart.

In conclusion then if you, or you know someone, who is in need great or small for any reason please do not hesitate to contact in complete confidence the Benevolent Secretary whose details are in the League News. (Benev.secretary@bartsleagueofnurses.org) She is only an email or phone call away.

Jill Gillett. Hon Treasurer



Scholarship Committee Annual Report May 2023

The Stewart Baines Coltart Scholarship Fund

Registered Charity 275165

Madam President and members of the League, I have great pleasure in presenting the Annual Report of the Stewart Baines Coltart Scholarship Fund Committee for the financial year ending 30th April 2023.

The Scholarship Fund continues to provide fully paid-up League members with financial assistance to help enhance life, career, and retirement, by supporting study and associated costs for courses and conferences. The committee met on four occasions over the past year. Hybrid meetings are held when possible to enable committee members unable to travel to London to participate.

My sincere thanks to the committee who have been patient and supportive as I stood in for Miss Sherlaw. Since May 2022, all applications for scholarship funding have been successfully submitted via the League website for the first time. Our thanks to Richard Walsh at Confluent Marketing for his support and swift resolution of any minor issues that arose. The changes made to the application form last year have proved to be effective; most applicants provided sufficient detail and did not require follow up for additional information.

This year, **28** applications have submitted, the same number as last year. Awards have been made for a variety of PhD, MSc, BSc and Diploma programmes, courses, and conferences and four non-vocational programmes. This year a total of **£40,586.11** has been awarded, 19% less than last year. Of this **£29,954.69** has so far been claimed.

The uncertainties for Global stock markets continue. This has an impact on investment income into the Scholarship Fund, which has necessarily affected the level of financial support that we can offer. So far, we have continued to receive sufficient income to provide some level of funding to all applicants, but we cannot guarantee always being able to honour requests for funding or offer ongoing continued support for lengthy courses. We do encourage members to submit applications and they are all carefully considered. There is no limit to the number of times members can apply for assistance. For details of income and expenditure for the past year, please see the accounts section of the League News.

To identify how recipients' new skills and knowledge have impacted their practice and/or their life, we ask them to submit a report on completion of their studies. These are published in the League News and now also on the website.

May 2022 (6 applications, 6 awards)

1:2022/23 Self-employed women's wellbeing coach – Hypopressives coach training

2:2022/23 Senior Staff Nurse ITU – Cardiovascular & Respiratory Healthcare

3:2022/23 Cardiac Rehab Nurse Specialist - Multidisciplinary Cardiac Rehab conference

4:2022/23 Semi-retired Energy Psychologist/Therapist – Biomagnetism Level 2 training

5:2022/23 Senior Lecturer Palliative Care – International Nurse Education Conference

6:2022/23 Senior Charge Nurse Critical Care – PG Course in Leadership and Service Improvement

September 2022 (6 applications, 5 awards, 1 not supported)

7:2022/23 Retired Nurse – Post Grad Certificate in Regional & Local History

8:2022/23 Semi-retired City & Guilds Verifier – Application not supported

9:2022/23 Senior Nurse Critical Care – MSc Cardiovascular & Respiratory Healthcare

10:2022/23 Staff Nurse ITU – Intensive Care Nursing Course

11:2022/23 Head of Quality & Education – Hospice UK Conference

12:2022/23 Staff Nurse A&E – Advanced assessment, critical reasoning & diagnostic reasoning course

November 2022 (6 applications, 5 awards, 1 refused)

13:2022/23 Emergency Nurse Practitioner – Advanced Clinical Practice Course

14:2022/23 Clinical Lead Primary Care – International Council of Nurses Conference

15:2022/23 Advanced Nurse Practitioner GP Practice & Lecturer – Professional Doctorate in Health

16:2022/23 Retired nurse – Foundation Course in Website Content design

17:2022/23 Audit & Quality Midwife – Advised to apply again when plans more concrete

18:2022/23 Retired nurse – One-to-One Piano Course

March 2023 (10 applications, 9 awards, 1 deferred)

19:2022/23 Retired Nurse – Diploma in Herbal Medicine

20:2022/23 Retired Nurse – Aquatics Fitness Professional Certification

21:2022/23 Advanced Nurse Practitioner – Minor Surgery Course

22:2022/23 Adult Critical Care Nurse – Mixed Methods Research Workshop

23:2022/23 Critical Care Nurse – Decision deferred pending more information from the applicant

24:2022/23 Retired Nurse – Certified Floral Designer Course

25:2022/23 Simulation and Skills Educator – International Clinical Skills Conference

26:2022/23 Associate Professor – International Clinical Skills Conference

27:2022/23 Consultant Nurse – Funding for research interviews and transcription

28:2022/23 Infant Feeding Adviser – Breast Feeding Specialist Training

Prof Maggie Nicol
Acting Honorary Secretary

Alexandra Hayward
Honorary Treasurer

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST BARTHOLOMEWS NURSES

England & Wales - Charity number 275165

Accounts

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2022

Charity Number : 275165

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CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

TRUSTEES' ANNUAL REPORT FOR THE YEAR ENDED 30 APRIL 2022

Reference and administration details

Registered charity number: 275165

Charity's principle address: The Post Room, St. Bartholomew's Hospital
West Smithfield, London EC1A 7BE

Names of Charity Trustees who manage the charity:

Mrs E Wood-Dow OBE	President of the League
Mrs N Marks	Honorary General Secretary
Mrs R E Campbell	Honorary Treasurer
Mrs H Mathews	Honorary Secretary – Benevolent Fund
Mrs J Gillett	Honorary Treasurer – Benevolent Fund
Miss D Sherlaw (Chair)	Honorary Secretary – Stewart Baines Coltart Scholarship Fund
Mrs A Hayward	Honorary Treasurer – Stewart Baines Coltart Scholarship Fund

Dame Nancy Hallett External adviser to the trustees

All Trustees are Honorary roles.

Structure, governance and management

The League is governed by a constitution document that was last revised and updated in 2015 and is managed by the League Executive Committee. The Constitution is currently under review and is anticipated to be agreed at the Annual General Meeting in October 2022. Honorary Officers are elected every three years; the President serves a five-year term of office and may be re-elected for a second term.

Objectives and activities

The objects of the League are:

1. To further the best interests of nursing and the nursing profession.
2. To afford mutual help and to promote social interaction.
3. To promote and maintain a Benevolent Fund for the benefit of League members and St. Bartholomew's nurses who trained prior to September 1993.
4. To promote and maintain Scholarship Funds for the benefit of League members.

In accordance with the constitution, the Benevolent Fund is available to provide assistance not only to League members, but also to any nurse who trained at St. Bartholomew's Hospital or who qualified as a nurse at St. Bartholomew's School of Nursing and Midwifery prior to September 1993. The sub-committee, which administers the Fund on behalf of the League, is concerned to give assistance to those who are going through periods of hardship. The sub-committee welcomes all applications and enquiries and meets six times a year, but urgent requests are considered throughout the year. Meetings have all been held virtually until June 2021 but are now being held in person. The Countrywide Network of Friendship facilitates local visits to members who would appreciate support and friendship.

The Scholarship Fund financially assists members of the League with course and conference fees and associated costs of study. A sub-committee administers the fund and meets four times a year to consider applications for assistance with funding. These meetings have all been held virtually until September 2021 but are now being held in person.

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

TRUSTEES' ANNUAL REPORT FOR THE YEAR ENDED 30 APRIL 2022 (Continued.....)

Achievement and performance

In achieving the objects of the charities, the Trustees have been mindful of the Public Benefit requirement of the Charity Commission with particular regard to the advancement of education and the relief of financial hardship or other disadvantage. The Benevolent Fund has provided funds for the relief of poverty and has also provided specific items and care for those who are disadvantaged by age, ill health, disability, financial hardship or other disadvantage. The Countrywide Network of Friendship seeks to contact those who need help and support and to ensure that practical and/or financial resources are offered. League Regional Networks have now been established in three regions enabling members to meet for events that are closer to their home. These events have been highly successful, they provide support through social interaction and it is hoped that more networks will be established in the future.

The League Scholarship Fund has supported members in professional studies in order to enhance their skills and knowledge for the benefit of the organisations for which members work and, in turn, for the patients and communities they serve. The Fund has also supported League members in a wide range of other studies that provide opportunities for personal development and transferable skills. Details of achievements and performance of the Benevolent Fund and Scholarship Funds are published annually in the League News and presented to the Annual General Meeting. Some beneficiaries are resident outside England and Wales, but transfer of money was through the regulated banking system.

No serious incidents have occurred during the current year.

Financial Review

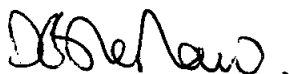
The Trustees' policy is to build satisfactory levels of funds to provide a secure base for the fulfilment of the charitable objectives. During the year a tender exercise has been undertaken to ensure that the League's Investments are receiving the best management. Coutts Charity Investment Team have now taken over from Ravenscroft Investments UK to provide professional advice on investment management. Regular reporting and an annual review meeting takes place. No grant funding from central government or local authority is received and during the current year no income has been received from outside the UK. No Trustees have received remuneration other than expenses incurred.

In line with the Charity Commission good practice recommendations, the Trustees have developed a Charity Governance Code Assessment document and have a Risk Management Strategy, policies for Conflict of Interest, Investment and a Complaints and Feedback procedure. The Charitable Funds Management and Charity Grant Making Policies have been updated and a programme for updating the other existing policies has been initiated. A Diversity and Inclusion Policy is being written. All League policies are available on request.

Declaration

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

Signed on behalf of the Charity's Trustees:



Diana Sherlaw
Chair of Trustees
Dated: 8th July 2022

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2022

Charity Number : 275165

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

Independent examiner's report to the trustees of the Charities in Association with the League of St. Bartholomew's Nurses

I report to the charity trustees on my examination of the accounts of the Charities in Association with the League of St. Bartholomew's Nurses for the year ended 30 April 2022.

Responsibilities and basis of report

As the charity trustees of the Charitable Funds 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 Charitable Funds' accounts carried out under section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charitable Funds as required by section 130 of the Act; or
2. the accounts do not accord with the accounting records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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



J.R.Champion FCA
McLean Reid
Chartered Accountants & Registered Auditors
1 Forstal Road
Aylesford
Kent
ME20 7AU

Date: 11th July 2022

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

CONSOLIDATED STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2022

	Benevolent Fund (pages 6 to 7) £	Stewart Baines Coltart Scholarship Fund (pages 8 to 9) £	2022 Total £	2021 Total £
Receipts				
Donations, legacies and other similar receipts				
Donations & legacies	3290		3290	3749
Tax reclaim on gift aid donations	6	-	6	3000
Grants returned	-	-	-	-
Investment income receipts				
Income from investments	61172	22575	83747	75020
Deposit account interest	33	3	36	15
Income from Trust funds	-	-	-	241
Receipts from sale of investments	1410558	506755	1917313	613674
TOTAL RECEIPTS	1475059	529333	2004392	695699
Payments				
Charitable payments				
Grants paid	73534	31871	105405	78466
Management and administration	12127	5539	17666	18083
Other expenditure				
Transfer between funds	(725)	725	-	-
Purchase of investments	1361763	505051	1866814	550225
League News costs	14528	-	14528	13982
TOTAL PAYMENTS	1461227	543186	2004413	660756
Net receipts/(payments)	13832	(13853)	(21)	34943
<i>Cash funds last year end</i>	<i>91346</i>	<i>28022</i>	<i>119368</i>	<i>84425</i>
Cash funds this year end	105178	14169	119347	119368

CONSOLIDATED STATEMENT OF ASSETS AND LIABILITIES FOR THE YEAR ENDED 30 APRIL 2022

	Benevolent Fund (pages 6 to 7) £	Stewart Baines Coltart Scholarship Fund (pages 8 to 9) £	2022 Total £	2021 Total £
Cash funds				
Bank deposit account	92191	13165	105356	94825
Bank current account	12987	500	13487	14151
Cash in hand	-	504	504	10392
	105178	14169	119347	119368
Investment assets				
Investments at cost	1341965	497633	1839598	1583235
Investments at market value	1516663	499447	2016110	2038485

It is the Trustees' policy to accumulate sufficient funds to realise the Trust Deed objectives. All funds are unrestricted.

BENEVOLENT FUND

STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2022

	Note	2022 £	2021 £
Receipts			
Donations, legacies and other similar receipts			
Donations		1590	1648
Legacies		1700	1000
Tax reclaims on gift aid donations	2	6	3000
Investment income receipts			
Income from investments		61172	55552
Income from JG Hammond Trust		-	241
Deposit account interest		33	8
Other receipts			
Transfer from Scholarship Funds		725	-
Receipts from sale of investments		1410558	476357
TOTAL RECEIPTS		1475784	537806
Payments			
Charitable payments			
Grants paid		73534	58433
Publication of League News		9106	8883
League News postage & stationery costs		5422	5099
Management and administration	5	12127	11296
Other expenditure			
Purchase of investments		1361763	414673
		1461952	498384
Net receipts		13832	39422
<i>Cash funds last year end</i>		91346	51924
Cash funds this year end		105178	91346

STATEMENT OF ASSETS AND LIABILITES AS AT 30 APRIL 2022

	Note	2022 £	2021 £
Cash funds			
Bank deposit account		92191	68692
Bank current account		12987	13651
Cash floats	6	-	9003
		105178	91346
Investment assets			
Investments at cost	7	1341965	1142173
Investments at market value	7	1516663	1539389

BENEVOLENT FUND

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2022

1. Accounting basis

These accounts have been prepared using the "receipts and payments basis" and comply with section 133 of the Charities Act 2011.

2. Income tax recovery

The Benevolent Fund has received income tax refunds totalling £6 (2021: £3000) during the year. This represents income tax reclaimed on gift aid donations received during the tax year to 5th April 2021.

3. Accountancy charges

The Benevolent Fund has paid accountancy charges of £1220 (2021: £1220) to The League of St. Bartholomew's Nurses General Fund in respect of the share of accountancy charges for the year ended 30th April 2021. This sum is shown as part of the "management and administration" cost in the accounts.

4. Stockbroker fees

Included in "management and administration" costs is £8195 (2021: £9753) relating to the administration costs incurred by Vartan Ravenscroft.

During the year, the charity changed its stockbrokers from Vartan Ravenscroft to Coutts. This incurred a transfer fee of £1,500.

These sums are shown as part of the "management and administration" cost in the accounts.

5. Management and administration costs

Along with the expenditure noted in 3) and 4) above, these costs also include the cost of trustee meetings along with office and communication costs.

6. Cash floats

Included in the cash float is a figure of £nil (2021: £7072) held by the Stockbrokers.

7. Investments

	Nominal	Cost	Market value
		£	£
Marlborough Fd Mgr Multi Cap Income	40000 units	50824	60420
Premier Milton Investment Funds	30000 units	55793	64620
Equities Investment Fund for Charities (Charifund)	13500 units	50139	213264
CMAF Global Balanced	1391050 units	1185209	1178359
Total as at 30th April 2022		1341965	1516663

APPROVAL OF ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2022

I approve the statement of receipts and payments, statement of assets and liabilities and notes on pages 6 and 7 and confirm that I have made available all relevant records and information for their preparation.



Jill Gillett
Hon. Treasurer
8th July 2022

STEWART BAINES COLTART SCHOLARSHIP FUND

STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2022

	Note	2022 £	2021 £
Receipts			
Donations, legacies and other similar receipts			
Donations received		-	1101
Legacies received		-	-
Investment income receipts			
Income from investments		22575	19468
Deposit account interest		3	7
Income from JG Hammond Trust		-	-
Other receipts			
Receipts from sale of investments		506755	137317
Awards returned		-	-
TOTAL RECEIPTS		<u>529333</u>	<u>157893</u>
Payments			
Charitable payments			
Grants paid		31871	20033
Management and administration	2	4319	4161
Share of accountancy fees	3	1220	1220
Other expenditure			
Transfer to Benevolent Fund		725	-
Legal fees	4	-	1406
Purchase of investments		505051	135552
TOTAL PAYMENTS		<u>543186</u>	<u>162372</u>
Net (payments)		(13853)	(4479)
<i>Cash funds last year end</i>		<u>28022</u>	<u>32501</u>
Cash funds this year end		<u>14169</u>	<u>28022</u>

STATEMENT OF ASSETS AND LIABILITIES AS AT 30 APRIL 2022

	Note	2022 £	2021 £
Cash funds			
Bank deposit account		13165	26133
Bank current account		500	500
Cash floats		504	1389
		<u>14169</u>	<u>28022</u>
Investment assets			
Investments at cost	5	<u>497633</u>	<u>441062</u>
Investments at market value	5	<u>499447</u>	<u>499096</u>

STEWART BAINES COLTART SCHOLARSHIP FUND

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2022

1. Accounting basis

These accounts have been prepared using the "receipts and payments basis" and comply with section 133 of the Charities Act 2011.

2. Management and administration

The Stewart Baines Coltart Scholarship Fund has paid administration charges from Ravenscroft totalling **£3629 (2021: £3960)** and **£690 (2021: nil)** from Coultts.

3. Accountancy charges

The Stewart Baines Coltart Scholarship Fund has paid accountancy charges of **£1220 (2021: £1220)** to The League of St. Bartholomew's Nurses General Fund in respect of the share of accountancy charges for the year ended 30th April 2021.

4. Legal fees

Legal costs totalling **£nil (2021: £1406)** were paid to Stone King Solicitors for their work done with the Charity Commission in reviewing the Object of the Fund.

5. Investments

	Units	2022		2021	
		Market Value £	Cost £	Market Value £	Cost £
Digital 9 Infrastr Fund	25000	-	-	27625	25703
Sequoia Economic	41063	-	-	43855	43245
City of London Inv Ords	9000	-	-	34740	30402
Marborough Fd Mgr Multi Cap	22700	-	-	35466	32985
FIL Inv SVCS UK Global	14000	-	-	29330	23019
Montanaro UK Small Ords	24500	-	-	38588	29260
Lowland Investment Co	2700	-	-	35910	35315
First Trust Global Funds	1850	-	-	40321	35285
Premier Portfolio PM UK	14000	30156	25628	45666	36612
Schroder Unit Trust UK Income	60500	-	-	32549	32971
Blackrock World MI Ord	6000	-	-	37920	25025
Murray Int'l Trust Ord	2400	-	-	28944	23034
SDCL Energy Effici Ord	30000	-	-	34200	31759
Custodian Reit Ords £0.01	33250	-	-	33982	36447
Equator ICAV Coultts Multi Asset Global Balanced Fund	553996	469291	472005	-	-
		499447	497633	499096	441062

APPROVAL OF ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2022

I approve the statement of receipts and payments, statement of assets and liabilities on page 8 and the notes above and confirm that I have made available all relevant records and information for their preparation.



Alexandra Hayward
Hon. Treasurer
8th July 2022

Benevolent Fund report year ending 30 April 2022

Madam President and members of the League I am pleased to present the report of the Benevolent Fund subcommittee for the year ending 30 April 2022.

At the start of our financial year in May 2021 Covid 19 meeting restrictions had been lifted and it was a joy to meet again in person or have hybrid meetings with those who preferred to continue to zoom from home.

The committee met 6 times during the year efficiently organised by secretary Hilary Mathews plus 2 extraordinary zoom meetings to consider urgent requests. Jenny Kottler left the committee after 6 years of service for which we thank her greatly and in her place we welcomed Jane McDonald.

Coutts have now taken over from Ravenscroft as our stock brokers and the market value of our investments remain in excess of £1m.

Full details of all income and expenditure independently examined by McLean Reid Chartered Accountants will be printed in the League News.

Legacies and donations in excess of £3,000 have been gratefully received this year.

Over £73,000 has been spent on Gifts and grants and a further £14,500 on printing and posting the League News to our membership worldwide.

Gifts have included electric scooters, a wheelchair, stairlift, bathroom adaptation, surgery costs, medical consultations, physio and speech therapy services, boiler repairs, taxi fares to hospital appointments, temporary home help costs, Dragon computer aid and emergency grants.

Flowers have been sent to numerous members post operatively, in sympathy and in celebration of life events.

Christmas cards personally signed by our President were sent to over 450 members qualified 60 years or more with gift stamps for those living in the UK and League logo window stickers to those living abroad.

Letters were also sent to the 56 members who qualified in 1962 reminding them of the scope of the Benevolent fund and offering help if needed.

The Country wide network of friendship organised by Sue Finney continues to find visitors for members on request and personal visits post pandemic were resumed and welcomed as well as telephone calls.

It is wonderful to receive and share thank you letters and news from members, appreciating how significant a bouquet of flowers or a card can be as well as a major gift.

The Benevolent Fund Grant Making policy which is the formal document covering all aspects of Benevolent help was reviewed and approved by the Trustees and can be read on our website together with stories from members whose lives have been enhanced by gifts, particularly our new scooter users.

The most important thing to remember is that if you or you know someone who is in need for any reason do not hesitate to email or telephone Hilary Mathews in office hours (details in the League News) and she will respond quickly and empathetically.

Jill Gillett. Hon Treasurer



Scholarship Committee Annual Report May 2022

The Stewart Baines Coltart Scholarship Fund

Registered Charity 275165

Madam President and members of the League, I have great pleasure in presenting the Annual Report of the Stewart Baines Coltart Scholarship Fund Committee for the financial year ending 30th April 2022.

The Scholarship Fund continues to provide fully paid-up League members with financial assistance to help enhance life, career and retirement, by supporting study and associated costs for courses and conferences.

The committee has met on four occasions over the past year; we were pleased to start meeting again in person from September. Our plans to run hybrid meetings have not yet been realised, mainly due to technical issues, but we remain hopeful that we will be able to do so in the future.

My continued thanks are due to our committee members who have been patient and helpful with our new processes. Two of our number have finished their terms of office on the committee and we have welcomed their replacements, who have settled into their roles. During the year, the committee have developed a committee member job description, an exercise which has identified the expectations of committee membership.

This year, **21** League members have submitted **28** applications, an encouraging increase of 23% and 47% on last year's figures. This includes two members whose applications were deferred from the previous financial year. Of this year's applications, £49,900 has been agreed, an increase of 59% on last year. £29,935 of this total has so far been claimed. Two recipients have been unable to claim their awards due to not being able to undertake their studies, one applicant withdrew, and one recipient's course was cancelled. Unfortunately, after much deliberation and discussion, we have had to refuse funding for three applications, in order to maintain good governance and to comply with the Fund's objectives, the League Constitution and the Charity Commission. We have had to contact several applicants for more information due to incomplete form filling and lack of required detail, and we hope our redesign of the application form will help avoid this in future.

We have spent considerable time this year re-developing the scholarship application form, which is now live on the website under "Request our help". We have separated the form into vocational and non-vocational studies, asking for greater detail regarding specific course and conferences, accreditation, qualifications, website links and costs involved. It is hoped that this will obviate the need for continued chasing and investigation in order to facilitate useful discussion at our meetings.

Awards have been made for a variety of PhD, MSc, BSc and Diploma programmes and courses and for one conference. Of these, only three are for non-vocational programmes.

The Trustees have completed a tender exercise over the year to ensure good governance of our investments and we are gradually changing their management from Ravenscroft Investments UK to Coutts Charity Investment. The uncertainties surrounding Brexit have

been totally eclipsed by the Global Coronavirus pandemic. Global stock markets have all been affected and this is having an impact on investment income into the Scholarship Fund, which has necessarily affected the level of financial support that we can offer. So far, we have continued to receive sufficient income to provide some level of funding to all applicants, but we cannot guarantee always being able to honour the request in full, or indeed to offer ongoing continued support for lengthy courses. We do encourage members to submit applications, they are all carefully considered and there is no limit to the number of times members can apply for assistance.

For details of income and expenditure for the past year, please see the accounts in the League News and on the platform.

In order to identify how recipients' new skills and knowledge have impacted their practice and/or their life, we ask them to submit a report on completion of their studies. These are published in the League News, but we have also started to post them on the website, for which we have received positive feedback.

Please do continue to apply for assistance with your studies and conference attendance. We cannot guarantee that we can always honour the request in full, or indeed to offer ongoing continued support for lengthy courses, but we do consider all applications carefully, for both vocational and non-vocational study.

We look forward to the year ahead and to being able to assist more League members with a variety of studies and conferences.

May 2021 (10 applications, 9 applicants, 7 awards, 1 refused, 1 deferred) £14,950

1: 2021/2022

Self-employed complementary therapist, focussing mainly on using reproductive reflexology to support couples through their fertility journeys: Advanced Reproflexology Course through Seren Natural Fertility – Further information required, DEFERRED TO SEPTEMBER MEETING; SUBSEQUENTLY DECIDED AGAINST COURSE.

2: 2021/2022

Semi-retired external verifier for City & Guilds Health and Social Care Courses: £1500; Diploma in Naturopathic Principles at the College of Naturopathic Nutrition

3: 2021/2022

Charge Nurse, Adult Critical Care: £360; e-Advanced Life Support Course A-to-E Training and Solutions

4: 2021/2022

Charge Nurse, Adult Critical Care: £2640; Advanced Assessment Skills for Non-Medical Practitioner Level 7 @ Kings College COURSE CANCELLED

5: 2021/2022

Head of Quality and Education, local Hospice: £700; Hospice UK National Conference

6: 2021/2022

NHS Trust Band 7 Senior Occupational Health Advisor: £2000; BSc Occupational Health @ Robert Gordon University

7: 2021/2022

Staff Nurse on Hospital Admissions Unit: £1000; RCN Accredited Practice Nurse Training in Malvern

8: 2021/2022

Advanced Nurse Practitioner and Lead for End-of-Life Care, GP Surgery: £2750; Doctorate in Health @ University of Lancaster

9: 2021/2022

Staff Nurse, Adult Critical Care Unit: £4000; MSc Cardiovascular and Respiratory Healthcare at Imperial College

10: 2021/2022

Self-employed complementary therapist and trainer, supporting families through fertility, pregnancy, birthing and post-partum issues: the H.E.A.L. and T.H.R.I.V.E. Method Energy Healing Diploma Course @ Jennie Harrison – Not enough information offered by applicant or course leader, APPLICATION REFUSED.

September 2021 (8 applications, 8 applicants, 7 awards) £15,000

11: 2021/2022

Audit and Quality Midwife: £2,750; PhD Midwifery

12: 2021/2022

Freelance Field Survey Nurse for Office of National Statistics & National Centre for Social Research and Health & Wellbeing Coach: £500; Intensive Yoga Course at Uplifted Online

13: 2021/2022

Part time Band C Staff Nurse: £2,000; Undergraduate Certification in Genetics at the Institute of Continuing Education, University of Cambridge

14: 2021/ 2022

Nurse for Looked After Children: £1,750; Level 5 Diploma in Practitioner Reflexology

15: 2021/2022

Staff Nurse, Adult Critical Care Unit: £5,000; MSc Health Management

16: 2021/2022

Charge Nurse, Adult Critical Care Unit; PhD in Nursing Studies APPLICATION REFUSED, MORE INFORMATION REQUESTED

17: 2021/2022

Part time Community Midwife and Private Ante Natal Preparation and Hypnobirth Teacher: £1,000; Diploma in Complementary Therapies in Midwifery Practice at Expectancy

18: 2021/2022

Senior Clinical Advisor, Stop the Pressure Programme, NHS England and Improvement: £2,000; Nursing and Midwifery PhD with the Skin Sciences Institute, University of Huddersfield

November 2021 (2 applications, 2 applicants, 2 awards) £5,650

19: 2021/2022

Retired Research Nurse, Research Project Manager and Head of Research Governance; £650: UK Society of Celebrants Family and Funeral Diploma (Fast Track)

20: 2021/2022

Staff Nurse, Adult Critical Care Unit: £5,000; MSc Health Management

March 2022 (8 applications, 7 applicants, 7 awards) £14,300

21: 2021/2022

Semi-retired external verifier for City & Guilds Health and Social Care Courses: £2,000; Diploma in Naturopathic Nutrition at the College of Naturopathic Nutrition

22: 2021/2022

Semi-retired external verifier for City & Guilds Health and Social Care Courses: £850; Diploma in Naturopathic Principles at the College of Naturopathic Nutrition

23: 2021/2022

Senior Staff Nurse, Adult Critical Care Unit, SBH: £3,000; MSc Cardiovascular and Respiratory Healthcare at Imperial College

24: 2021/2022

Emergency Nurse Practitioner, A&E, Royal London: £3,500; MSc Advance Clinical Practice @ City University

25: 2021/2022

Retired, recently stood down as elected councillor: £1,100; City & Guilds Millinery Course, Level 2 at Morley College, Chelsea

26: 2021/2022

Senior Charge Nurse, Adult Critical Care, SBH: PhD in Nursing Studies
APPLICATION REFUSED FOLLOWING ASCQUISITION OF FURTHER INFORMATION

27: 2021/2022

CNS Team Lead, Palliative Care, St Catherine's Hospice: £350; The Oxford Advanced Pain and Symptom Management Course

28: 2021/2022

Lead Nurses/Practitioner, the Avenue Surgery: £3,500; MSc Clinical Practice

**Diana Sherlaw
Honorary Secretary**

**Alexandra Hayward
Honorary Treasurer**

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST BARTHOLOMEWS NURSES

England & Wales - Charity number 275165

Accounts

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2021

Charity Number : 275165

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CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

TRUSTEES' ANNUAL REPORT FOR THE YEAR ENDED 30 APRIL 2021

Reference and administration details

Registered charity number: 275165

Charity's principle address: The Post Room, St. Bartholomew's Hospital
West Smithfield, London EC1A 7BE

Names of charity trustees who manage the charity:

The persons listed below acted as trustees of the League throughout the year.

Mrs E Wood-Dow OBE	President of the League
Mrs N Marks	Honorary General Secretary
Mrs R E Campbell	Honorary Treasurer
Mrs H Mathews	Honorary Secretary – Benevolent Fund
Mrs J Gillett	Honorary Treasurer – Benevolent Fund
Miss D Sherlaw (Chair)	Honorary Secretary – Stewart Baines Coltart Scholarship Fund
Mrs A Hayward	Honorary Treasurer – Stewart Baines Coltart Scholarship Fund

Dame Nancy Hallett External adviser to the trustees

All Trustees are Honorary roles; A.Harvey and M.Nicol resigned November 2020 but did not take up employment with the charity on resignation.

Structure, governance and management

The League is governed by a constitution document that was last revised and updated in 2015 and is managed by the League Executive Committee. Members of the Executive Committee are elected every three years; the President serves a five-year term of office and may be re-elected for a second term.

Objectives and activities

The objects of the League are:

1. To further the best interests of nursing and the nursing profession.
2. To afford mutual help and to promote social interaction.
3. To promote and maintain a Benevolent Fund for the benefit of League members and St. Bartholomew's nurses who trained prior to September 1993.
4. To promote and maintain Scholarship Funds for the benefit of League members.

In accordance with the constitution, the Benevolent Fund is available to provide assistance not only to League members, but also to any nurse who trained at St. Bartholomew's Hospital. The sub-committee, which administers the Fund on behalf of the League, is concerned to give assistance to those who are going through periods of hardship. The sub-committee welcomes all applications and enquiries. The sub-committee meets six times a year, but urgent requests are considered throughout the year. Meetings have all been held virtually 2020-21. The Countrywide Network of Friendship facilitates local visits to members who would appreciate support and friendship.

The Scholarship Fund financially assists members of the League with course and conference fees and associated costs of study. A sub-committee administers the fund and meets four times a year to consider applications for assistance with funding. These meetings have all been held virtually 2020-21.

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

TRUSTEES' ANNUAL REPORT FOR THE YEAR ENDED 30 APRIL 2021 (Continued)

Achievement and performance

In achieving the objects of the charities the trustees have been mindful of the Public Benefit requirement of the Charity Commission with particular regard to the advancement of education and the relief of financial hardship or other disadvantage. The Benevolent Fund has provided funds for the relief of poverty and has also provided specific items and care for those who are disadvantaged by age, ill health, disability, financial hardship or other disadvantage. During the Coronavirus pandemic a system of emergency awards has been established. The Countrywide Network of Friendship seeks to contact those who need help and support and to ensure that practical and/or financial resources are offered. League Regional Networks have now been established in three regions enabling members to get together for social events that are closer to home. These get-togethers have been very successful and it is hoped that more networks will be established in the future.

The League Scholarship Funds have supported members in professional studies in order to enhance their skills and knowledge for the benefit of the organisations for which members work and, in turn, for the patients and communities they serve. The Scholarship Funds have also supported League members in a wide range of other studies that provide opportunities for personal development and transferable skills. Details of achievements and performance of the Benevolent Fund and Scholarship Funds are published annually in the League News. Some beneficiaries are resident outside England and Wales, but transfer of money was through the regulated banking system.

No serious incidents have occurred during the current year.

Financial Review

The trustees' policy is to build satisfactory levels of funds to provide a secure base for the fulfilment of the charitable objectives. The Charities' Funds are managed by Ravenscroft Investments UK who provide professional advice and regular reports. An annual review meeting takes place. No grant funding from central government or local authority is received and during the current year no income has been received from outside the UK. No Trustees have received remuneration other than expenses incurred.

In line with the Charity Commission good practice recommendations, the Trustees have developed a Charity Governance Code Assessment document and have a Risk Management Strategy and a Complaints and Feedback procedure. The Charitable Funds Management and Charity Grant Making Policies have been updated and a programme for updating the other existing policies has been initiated. An Investment Policy has been written and finalised in order to ensure good governance of investments. All League policies are available via the League website.

Declaration

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

Signed on behalf of the charity's trustees:



Diana Sherlaw
Chair of Trustees
Dated: 21 June 2021

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2021

Charity Number : 275165

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

Independent examiner's report to the trustees of the Charities in Association with the League of St. Bartholomew's Nurses

I report to the charity trustees on my examination of the accounts of the Charities in Association with the League of St. Bartholomew's Nurses for the year ended 30 April 2021.

Responsibilities and basis of report

As the charity trustees of the Charitable Funds 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 Charitable Funds' accounts carried out under section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Charitable Funds as required by section 130 of the Act; or
2. the accounts do not accord with the accounting records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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



J.R.Champion FCA
McLean Reid
Chartered Accountants & Registered Auditors
1 Forstal Road
Aylesford
Kent
ME20 7AU

Date: 22nd June 2021

CHARITIES IN ASSOCIATION WITH THE LEAGUE OF ST. BARTHOLOMEW'S NURSES

CONSOLIDATED STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2021

	Benevolent Fund (pages 6 to 7) £	Stewart Baines Coltart Scholarship Fund (pages 8 to 9) £	2021 Total £	2020 Total £
Receipts				
Donations, legacies and other similar receipts				
Donations & legacies	2648	1101	3749	22923
Tax reclaim on gift aid donations	3000	-	3000	125
Grants returned	-	-	-	850
Investment income receipts				
Income from investments	55552	19468	75020	87877
Deposit account interest	8	7	15	135
Income from Trust funds	241	-	241	-
Receipts from sale of investments	476357	137317	613674	569824
TOTAL RECEIPTS	537806	157893	695699	681734
Payments				
Charitable payments				
Grants paid	58433	20033	78466	135474
Management and administration	11296	6787	18083	23949
Other expenditure				
Purchase of investments	414673	135552	550225	638098
League News costs	13982	-	13982	13998
TOTAL PAYMENTS	498384	162372	660756	811519
Net receipts/(payments)	39422	(4479)	34943	(129785)
<i>Cash funds last year end</i>	<i>51924</i>	<i>32501</i>	<i>84425</i>	<i>214210</i>
Cash funds this year end	91346	28022	119368	84425

CONSOLIDATED STATEMENT OF ASSETS AND LIABILITIES FOR THE YEAR ENDED 30 APRIL 2021

	Benevolent Fund (pages 6 to 7) £	Stewart Baines Coltart Scholarship Fund (pages 8 to 9) £	2021 Total £	2020 Total £
Cash funds				
Bank deposit account	68692	26133	94825	68510
Bank current account	13651	500	14151	5213
Cash in hand	9003	1389	10392	10702
	91346	28022	119368	84425
Investment assets				
Investments at cost	1142173	441062	1583235	1684835
Investments at market value	1539389	499096	2038485	1667224

It is the Trustees' policy to accumulate sufficient funds to realise the Trust Deed objectives. All funds are unrestricted.

BENEVOLENT FUND

STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2021

	Note	2021 £	2020 £
Receipts			
Donations, legacies and other similar receipts			
Donations		1648	13330
Legacies		1000	9593
Tax reclaims on gift aid donations	2	3000	125
Investment income receipts			
Income from investments		55552	65048
Income from JG Hammond Trust		241	-
Deposit account interest		8	83
Other receipts			
Receipts from sale of investments		<u>476357</u>	<u>416090</u>
TOTAL RECEIPTS		<u>537806</u>	<u>504269</u>
Payments			
Charitable payments			
Grants paid		58433	101129
Publication of League News		8883	9049
League News postage & stationery costs		5099	4949
Management and administration	5	11296	15370
Other expenditure			
Purchase of investments		<u>414673</u>	<u>462490</u>
		<u>498384</u>	<u>592987</u>
Net (payments)/receipts		39422	(88718)
<i>Cash funds last year end</i>		<u>51924</u>	<u>140642</u>
Cash funds this year end		<u>91346</u>	<u>51924</u>

STATEMENT OF ASSETS AND LIABILITIES AS AT 30 APRIL 2021

	Note	2021 £	2020 £
Cash funds			
Bank deposit account		68692	40139
Bank current account		13651	4713
Cash floats	6	<u>9003</u>	<u>7072</u>
		<u>91346</u>	<u>51924</u>
Investment assets			
Investments at cost	7	<u>1142173</u>	<u>1228223</u>
Investments at market value	7	<u>1539389</u>	<u>1267555</u>

BENEVOLENT FUND

NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2021

1. Accounting basis

These accounts have been prepared using the "receipts and payments basis" and comply with section 133 of the Charities Act 2011.

2. Income tax recovery

The Benevolent Fund has received income tax refunds totalling **£3000** (2020: £125) during the year. This represents income tax reclaimed on gift aid donations received during the tax year to 5th April 2020.

3. Accountancy charges

The Benevolent Fund has paid accountancy charges of **£1220** (2020: £1160) to The League of St. Bartholomew's Nurses General Fund in respect of the share of accountancy charges for the year ended 30th April 2020. This sum is shown as part of the "management and administration" cost in the accounts.

4. Stockbroker fees

Included in "management and administration" costs is **£9753** (2020: £12452) relating to the administration costs incurred by Vartan Ravenscroft, the charity's stockbrokers.

5. Management and administration costs

Along with the expenditure noted in 3) and 4) above, these costs also include the cost of trustee meetings along with office and communication costs.

6. Cash floats

Included in the cash float is a figure of **£7072** (2020: £7072) held by Vartan Ravenscroft, stockbrokers.

7. Investments

	Nominal	Cost	Market value
		£	£
Montanaro UK Small Ords	64000 units	75794	100800
Blackrock World MI Ords	13000 units	50140	82160
City of London	22500 units	75512	86850
Murray International Trust	6300 units	74748	75978
Sequoia Economic	68000 units	68352	72624
Schroeder Unit Trust	90000 units	81752	78012
Investment Fund Services Ltd	40000 units	51812	56360
Fundsmith LLP	10500 units	51983	56520
Supermarket Income	50000 units	53366	56750
Marlborough Fd Mgr Multi Cap Income	56000 units	71154	87494
Digital 9 Infrastructure	50000 units	51306	55250
Equities Investment Fund for Charities (Charifund)	16500 units	61281	252488
BNY Mellon Fund Managers	47633 units	50260	66158
Gore Street Energy	30000 units	30854	31050
FIL Inv SVCS UK Global	35000 units	56495	73325
NB Private Equity Class 'A' Ord	4400 units	49937	61160
First Trust Global US Equity	4500 units	60173	98078
Link Fund Solutions Ltd	40000 units	74390	91332
SDCL Energy Efficient Inc	50000 units	52864	57000
Total as at 30th April 2019		1142173	1539389

APPROVAL OF ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2021

I approve the statement of receipts and payments, statement of assets and liabilities and notes on pages 6 and 7 and confirm that I have made available all relevant records and information for their preparation.



Jill Gillett
Hon. Treasurer
21st June 2021

STEWART BAINES COLTART SCHOLARSHIP FUND

STATEMENT OF RECEIPTS AND PAYMENTS FOR THE YEAR ENDED 30 APRIL 2021

	Note	2021 £	2020 £
Receipts			
Donations, legacies and other similar receipts			
Donations received		1101	-
Legacies received		-	-
Investment income receipts			
Income from investments		19468	22829
Deposit account interest		7	52
Income from JG Hammond Trust		-	-
Other receipts			
Receipts from sale of investments		137317	153734
Awards returned		-	850
TOTAL RECEIPTS		<u>157893</u>	<u>177465</u>
Payments			
Charitable payments			
Grants paid		20033	34345
Management and administration	2	4161	5338
Share of accountancy fees	3	1220	1160
Other expenditure			
Legal fees	4	1406	2081
Purchase of investments		135552	175608
TOTAL PAYMENTS		<u>162372</u>	<u>218532</u>
Net (payments)		(4479)	(41067)
<i>Cash funds last year end</i>		<u>32501</u>	<u>73568</u>
Cash funds this year end		<u>28022</u>	<u>32501</u>

STATEMENT OF ASSETS AND LIABILITIES AS AT 30 APRIL 2021

	Note	2021 £	2020 £
Cash funds			
Bank deposit account		26133	28371
Bank current account		500	500
Cash float		1389	3630
		<u>28022</u>	<u>32501</u>
Investment assets			
Investments at cost	5	<u>441062</u>	<u>456612</u>
Investments at market value	5	<u>499096</u>	<u>399669</u>

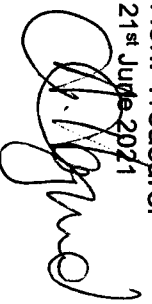
STEWART BAINES COLTART SCHOLARSHIP FUND NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2021

1. Accounting basis
- These accounts have been prepared using the "receipts and payments basis" and comply with section 133 of the Charities Act 2011.
2. Management and administration
- The Stewart Baines Coltart Scholarship Fund has paid administration charges from Ravenscroft totalling £3960 (2020: £4997).
3. Accountancy charges
- The Stewart Baines Coltart Scholarship Fund has paid accountancy charges of £1220 (2020: £1160) to The League of St. Bartholomew's Nurses General Fund in respect of the share of accountancy charges for the year ended 30th April 2020.
4. Legal fees
- Legal costs totalling £1406 (2020: £2081) have been paid to Stone King Solicitors for their work done with the Charity Commission in reviewing the Object of the Fund.
5. Investments

	Units	2021		2020	
		Market Value £	Cost £	Market Value £	Cost £
Digital 9 Infrastr Fund	25000	27625	25703	-	-
Lazard Fund Global Equity	-	-	-	24246	24644
Sequoia Economic	41063	43855	43245	40652	43245
City of London Inv Ords	9000	34740	30402	-	-
J O Hambro Capital UK Equity Inc	-	-	-	28366	38102
Marlborough Fd Mgr Multi Cap	22700	35466	32985	29601	32985
FIL Inv SVCS UK Global	14000	29330	23019	26376	23019
Montanaro UK Small Ords	24500	38588	29260	27685	29260
Threadneedle Investment SVCS Ltd	-	-	-	24516	29254
John Laling Environ	-	-	-	30938	8393
Schroder Unit Trust Asian Income	-	-	-	23127	31012
Lowland Investment Co	2700	35910	35315	25812	35315
First Trust Global Funds	1850	40321	35285	27001	35285
Premier Portfolio PM UK	20000	45666	36612	34332	36680
Schroder Unit Trust UK Income	60500	32549	32971	28090	32971
Blackrock World MI Ord	6000	37920	25025	-	-
Murray Int'l Trust Ord	2400	28944	23034	-	-
SDCL Energy Effici Ord	30000	34200	31759	-	-
Custodian Reit Ords £0.01	33250	33982	36447	28927	36447
		<u>499096</u>	<u>441062</u>	<u>399669</u>	<u>456612</u>

APPROVAL OF ACCOUNTS FOR THE YEAR ENDED 30 APRIL 2021

I approve the statement of receipts and payments, statement of assets and liabilities on page 11 and the notes above and confirm that I have made available all relevant records and information for their preparation.

Alexandra Hayward
 Hon. Treasurer
 21st June 2021




Scholarship Committee Annual Report May 2021

The Stewart Baines Coltart Scholarship Fund

Registered Charity 275165

Madam President and members of the League, I have great pleasure in presenting the Annual Report of the Stewart Baines Coltart Scholarship Fund Committee for the financial year ending 30th April 2021.

The aim of the Scholarship Fund is to provide fully paid-up League members with financial assistance to help enhance life, career and retirement. We do this by supporting study and associated costs for courses and conferences.

The committee has continued to comply with restrictions imposed by the COVID 19 pandemic and has met virtually on four occasions over the past year. In spite of the occasional technical issue, these meetings have been well attended and have given us food for thought for the future. If we can manage to run hybrid types of meetings, it would give members living too far away to travel to London regularly the opportunity to serve on the committees. However, at present, this is a work in progress.

My thanks are due to our committee members who have been patient and helpful with our new processes. Alex Hayward has now taken over as Honorary Treasurer and has settled in, with new ideas and I look forward to working with her for years to come.

We have now completed the process of merging the three Scholarship Funds which has so far, as we anticipated, made our processes less complicated and more transparent.

This year, **17** League members have submitted **19** applications, quite a reduction on last year, which we feel reflects the COVID 19 pandemic. Of these applications, a total of £31,414 has been agreed, of which £20,033 has so far been claimed, including two payments (£3,000) carried over from the last financial year. A deficit of £8,725 in the total agreed is accounted for by employers offering to pay fees before the recipient claimed the award from us. We have also deferred two applications, for consideration at a later date, requesting further information from applicants, both to ensure good governance and to fulfil our obligations to the Charity Commission. Unfortunately, we have at times been disappointed with the quality of completion of application forms; this has meant that we have been unable to make decisions, resulting in extra work and a delay in awarding grants.

We have agreed awards for a variety of degree and diploma programmes and courses. Notable is the lack of applications to assist with attending conferences, clearly also due to the current global situation. We have also noticed that many of the applications we have received are for non-nursing studies. Historically we have not differentiated between professional and personal development, but in the current financial climate this is possibly something we may need to address in the future.

Ravenscroft Investments UK continue to manage our investments and the uncertainties surrounding Brexit have been totally eclipsed by the Global Coronavirus pandemic. Global stock markets have all been affected and this is having an impact

on investment income into the Scholarship Fund, which has necessarily affected the level of financial support that we can offer. So far, we have continued to receive sufficient income to provide some level of funding to all applicants, but we cannot guarantee always being able to honour the request in full, or indeed to offer ongoing continued support for lengthy courses. We do encourage members to submit applications, they are all carefully considered and there is no limit to the number of times members can apply for assistance.

For details of income and expenditure for the past year, please see our accounts pages

We ask recipients to submit a report on completion of their studies, identifying how their new skills have affected their practice or their life; these make interesting reading, as you will no doubt have seen in the League News.

We look forward to the year ahead and to being able to assist more League members with a variety of studies and conferences.

Scholarship / Education Committee Annual Report May 2021

May 2020 (4 applications, 4 awards agreed)

(1:2020/21)

Junior Sister, Adult Critical Care Unit; Cardiorespiratory MSc

(2:2020/21)

Lead Nurse, Pre-Assessment; Block Printing and Quilting Course

(3:2020/21)

Retired; Open University BA (Hons) English Literature

(4:2020/21)

Retired Research Nurse, Research Project Manager and Head of Research Governance; UK Society of Celebrants Family and Funeral Diploma

September 2020 (4 applications, 4 awards agreed)

(5:2020/21)

Part time Community Band 5 Staff Nurse; End of Life Care Course

(6:2020/21)

Lead Clinical Nurse Specialist for children with intestinal failure; Resilience Based Clinical Supervision Programme

(7:2020/21)

Previous County Council Occupational Health Advisor; Occupational Health BSc

(8:2020/21)

Medical Centre Advanced Nurse Practitioner and Lead in End of Life Care; Professional Doctorate in Health

November 2020 (4 applications, 4 awards agreed) (applicant 12 non claimant)

(9:2020/21)

Nurse Practitioner & Non Medical Prescriber with MOD in Cyprus; MSc Advanced Clinical Practice, University of Cumbria

(10:2020/21)

Student, wife, mother & home maker; Creative Writing BA (Hons), University of Winchester

(11:2020/21)

Retired, previous Associate Professor, University of Warwick Medical School; Production of Photobook to celebrate 50th Anniversary, Set 96

(12:2020/21)

Sister, Adult Critical Care Unit; BSc (Hons) Nursing (Professional Practice) Top Up, Middlesex University

March 2021 (7 applications, 5 awards, 2 deferrals) (applicant 16 withdrew pre meeting)

(13:2020/21)

Nurse Team Leader and Advanced Nurse Practitioner in Sexual Health; Supporting Learners in Practice

(14:2020/21)

Semi retired external verifier for City & Guilds Health and Social Care Courses; Diploma in Naturopathic Nutrition at the College of Naturopathic Nutrition

(15:2020/21)

Retired Nurse, Midwife, Health Visitor, Teacher and Researcher; Golden Egg Academy Wales and South West Story Foundations Course

(17:2020/21) Deferred to next meeting

Advanced Nurse Practitioner and Lead for End of Life Care; Professional Doctorate in Health, University of Lancaster

(18:2020/21)

Retired Research Nurse, Research Project Manager and Head of Research Governance; UK Society of Celebrants Family and Funeral Diploma (Fast Track)

(19:2020/21)

Newly redundant International Development Director; PhD Global Health, London School of Hygiene and Tropical Medicine

(20:2020/21) Deferred to next meeting

Self employed Complementary Therapist and Trainer supporting families through fertility, pregnancy, birthing and post partum; The Heal and Thrive Method Energy Healing Diploma Course

**Diana Sherlaw
Honorary Secretary**

**Alexandra Hayward
Honorary Treasurer**

Benevolent Fund report year ending 30 April 2021

Madam President and members of the League I am pleased to present the report of the Benevolent sub - committee for the year ending 30 April 2021.

At our year end in April 2020 we had just entered the first National lockdown with all the uncertainty of the Covid Pandemic while this year restrictions are easing and we are emerging from a most difficult year on so many fronts.

Despite Brexit and the Pandemic our funds remain very healthy boosted by generous donations and legacies. Full details as usual will be printed in the League News.

Financial awards in excess of £58,000 have been made this year to both working and retired members.

These include mobility aids, convalescence, physiotherapy and emergency grants to help in times of unexpected crisis.

Christmas cards with gift stamps or fridge magnets were sent to 465+ members worldwide who qualified more than 60 years ago.

64 flower gifts were sent to members recovering from accidents, returning home from hospital, experiencing bereavement or celebrating special life events.

Letters were sent to members who qualified in 1961, 60 years ago, reminding them of the League and how the Benevolent fund can help in times of financial need for any reason.

In return we have received lovely letters, emails and telephone calls of thanks and learnt of amazing professional and personal experiences and adventures. All say how proud they are to be a Barts nurse.

The Countrywide network visitors have had to keep in touch by very welcomed phone calls rather than visits this year because of the social restrictions.

The Benevolent fund as usual paid for the publication and postage of the annual League News to all 2500 members.

The committee has met regularly by zoom with Hilary Mathews, secretary, co-ordinating our work with efficiency, empathy and good humour.

Sometimes it takes courage to admit we need or would like help particularly as being Barts nurses our default setting is to give help BUT please email Hilary (benev.secretary@bartsleagueofnurses.org) or write to her via Barts Postroom if you think there is anything we can do and be assured of a prompt, confidential reply. It really is that straightforward.

Finally, I would like to thank our accountants McLean Reid and Ravenscroft our investment managers for all their help during the year.

Jill Gillett

Hon. Treasurer.