

# 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  
17<sup>th</sup> 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: 18<sup>th</sup> 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 £
<b>Receipts</b>				
<b>Donations, legacies and other similar receipts</b>				
Donations & legacies	5653	1160	6813	17000
Tax reclaim on gift aid donations	75	-	75	29
Grants returned	-	-	-	1000
<b>Investment income receipts</b>				
Income from investments	27935	9495	37430	28104
Deposit account interest	898	154	1052	1191
Income from Trust funds	-	-	-	-
<b>Receipts from sale of investments</b>	71927	655	72582	58009
<b>TOTAL RECEIPTS</b>	<b>106488</b>	<b>11464</b>	<b>117952</b>	<b>105333</b>
<b>Payments</b>				
<b>Charitable payments</b>				
Grants paid	90731	20163	110894	97997
Management and administration	4870	734	5604	6446
<b>Other expenditure</b>				
Purchase of investments	-	-	-	-
League News costs	15737	-	15737	16659
<b>TOTAL PAYMENTS</b>	<b>111338</b>	<b>20897</b>	<b>132235</b>	<b>121102</b>
<b>Net (payments)</b>	<b>(4850)</b>	<b>(9433)</b>	<b>(14283)</b>	<b>(15769)</b>
<i>Cash funds last year end</i>	<i>64680</i>	<i>16123</i>	<i>80803</i>	<i>96572</i>
<b>Cash funds this year end</b>	<b>59830</b>	<b>6690</b>	<b>66520</b>	<b>80803</b>

## 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 £
<b>Cash funds</b>				
Bank deposit account	58801	6189	64990	78489
Bank current account	1026	500	1526	2310
Cash in hand	3	1	4	4
	<b>59830</b>	<b>6690</b>	<b>66520</b>	<b>80803</b>
<b>Investment assets</b>				
Investments at cost	<b>1311138</b>	<b>497391</b>	<b>1808529</b>	<b>1964298</b>
Investments at market value	<b>1547071</b>	<b>543519</b>	<b>2090590</b>	<b>2064588</b>

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

## STATEMENT OF ASSETS AND LIABILITIES AS AT 30 APRIL 2025

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

# 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 5<sup>th</sup> 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 30<sup>th</sup> 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
<b>Total as at 30<sup>th</sup> April 2025</b>		<b>1311138</b>	<b>1547071</b>

## 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  
17<sup>th</sup> July 2025

# STEWART BAINES COLTART SCHOLARSHIP FUND

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

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

## STATEMENT OF ASSETS AND LIABILITIES AS AT 30 APRIL 2025

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



# 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 30<sup>th</sup> April 2024.

### 4. Cash floats

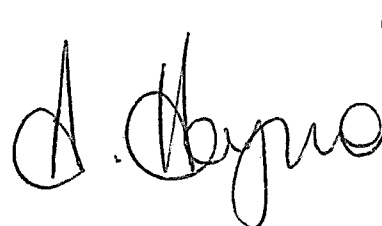
Included in the cash float is a figure of **£1** (2024: £1) held by the Stockbrokers.

### 5. Investments

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

### 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  
 17<sup>th</sup> 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 30<sup>th</sup> 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 125<sup>th</sup> 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 125<sup>th</sup> 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](mailto:Benev.secretary@bartsleagueofnurses.org))

or phone call away (07873 402814)

Jill Gillett. Hon Treasurer