

Will to Give

Northern Ireland · Charity number 102633

Details

Status	Overdue
Registered	2015-07-15
Register	View on the Charity Commission for Northern Ireland register

Contact

Address C/O Cleaver Fulton & Rankin
48-50 Bedford Street
Belfast
Bt2 7fw
BT2 7FW

Phone 028 9024 3141

Email info@willtogive.org

Website www.willtogive.org

Activities

Purposes: The Association's Objects are to promote the following purposes for the public benefit: The efficiency and effectiveness of organisations established for charitable purposes as defined in Section 2 of the Charities Act (Northern Ireland) 2008, in particular but not exclusively by the advancement of education in relation to legacy donations and giving throughout Northern Ireland by associating the statutory authorities, community and voluntary organisations and private sector bodies in a common effort to advance education and in particular: to promote and undertake research into legacy donations and giving in order to assist the efficiency of the charitable sector and to publicize the results of such research; to advance education amongst the public in relation to charitable donations and legacy giving in an effort to increase legacy income in the charitable sector; to provide advice, training and information on legacy fundraising techniques appropriate for charitable organisations; and such other exclusively charitable purpose according to the law of Northern Ireland as the Trustees may from time to time decide.

What the charity does: The advancement of citizenship or community development

How the charity works: Advice/advocacy/information, Education/training, General charitable purposes, Research/evaluation

Who the charity helps: General public, Voluntary and community sector

Finances

Period end	Income	Expenditure	Assets	Employees
2024-03-31	£23,653	£25,990	£0	0

Trustees

Name	Role	Appointed
Mr Brian Grzymek		
Mr Elliot Hogan		
Mr Jonathan Smyth		
Mr Mark McMahon		
Ms Samantha Coleman		

Will to Give

Northern Ireland - Charity number 102633

Accounts

				32766.5
03 APR	Membership	695.00		33,461.50
11 APR	Professional Services		967.59	32,493.91
14 APR	Insurance		80.02	32,413.89
18 APR	Membership	695		33,108.89
05 MAY	Membership	295		33,403.89
09 MAY	Membership	295		33,698.89
10 MAY	Professional Services		1073.39	32,625.50
12 MAY	Membership	295		32,920.50
	Membership	295		33,215.50
15 MAY	Membership	295		33,510.50
	Insurance		80.02	33,430.48
16 MAY	Membership	295		33,725.48
18 MAY	Membership	695		34,420.48
	Membership	295		34,715.48
	Membership	295		35,010.48
19 MAY	Website Costs		471.24	34,539.24
22 MAY	Membership	695		35,234.24
	Membership	295		35,529.24
24 MAY	Membership	295		35,824.24
25 MAY	Membership	295		36,119.24
26 MAY	Membership	695		36,814.24
	Membership	695		37,509.24
	Membership	295		37,804.24
30 MAY	Membership	695		38,499.24
	Membership	295		38,794.24
31 MAY	Membership	695		39,489.24
01 JUN	Sector Matters		30	39,459.24
02 JUN	Membership	695		40,154.24
	Membership	295		40,449.24
	Membership	695		41,144.24
	Membership	695		41,839.24
	Membership	695		42,534.24
07 JUN	Membership	295		42,829.24
	Membership	295		43,124.24
08 JUN	Membership	295		43,419.24
	Membership	295		43,714.24
09 JUN	Professional Services		967.59	42,746.65
14 JUN	Membership	695		43,441.65
	Membership	295		43,736.65
	Insurance		80.02	43,656.63
20 JUN	Membership	695		44,351.63
26 JUN	Membership	695		45,046.63
	Membership	695		45,741.63
30 JUN	Membership	695		46,436.63
03 JUL	Membership	695		47,131.63
	Campaign & Events		1125	46,006.63
	Sector Matters		7200	38,806.63
04 JUL	Professional Services		1080.54	37,726.09
05 JUL	Professional Services	695		38,421.09
14 JUL	Insurance		80.02	38,341.07
28-Jul	Membership	695		39,036.07
01-Aug	Membership	695		39,731.07
07-Aug	Professional Services		967.59	38,763.48
14-Aug	Insurance		80.02	38,683.46
31 AUG	Membership	695		39,378.46
07 SEP	Membership	147.5		39,525.96
12 SEP	Professional Services		1049.19	38,476.77
14 SEP	Insurance		80.02	38,396.75
15 SEP	Membership	147.5		38,544.25
21 SEP	Membership	55.6		38,599.85
	Membership	27.8		38,627.65

25 SEP	Campaign & Events		2500	36,127.65
	Campaign & Events		1293.02	34,834.63
16 OCT	Insurance		84.11	34,750.52
19 OCT	Professional Services		1443.03	33,307.49
14 NOV	Membership	695		34,002.49
	Insurance		84.02	33,918.47
22 NOV	Professional Services		967.59	32,950.88
27 NOV	Membership	695		33,645.88
12 DEC	Professional Services		967.59	32,678.29
14 DEC	Insurance		84.02	32,594.27
22 DEC	Membership	695		33,289.27
12 JAN 2024	Professional Services		967.59	32,321.68
15 JAN	Insurance		84.02	32,237.66
31 JAN	Membership	295		32,532.66
02 FEB	Professional Services		967.59	31,565.07
14 FEB	Insurance		84.02	31,481.05
08 MAR	Professional Services		967.59	30,513.46
14 MAR	Insurance		84.02	30,429.44
		23,653.40	25,990.46	

Income (Members)	22958
Professional Services	695
	23653

Campaign events	4918
Insurance	984
Professional services	12387
Sector Matter 72030	7230
General (Web costs)	471
	25990

Net Deficit	2,337
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	Campaign & Events	1125.00	46,006.63
25 SEP	Campaign & Events	2500.00	36,127.65
	Campaign & Events	1,293.02	34,834.63
14 APR	Insurance	80.02	32,413.89
	Insurance	80.02	33,430.48
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14 JUL	Insurance	80.02	38,341.07
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	Membership	27.80		38,627.65
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08 MAR	Professional Services		967.59	30,513.46
01 JUN	Sector Matters		30.00	39,459.24
	Sector Matters		7,200.00	38,806.63
19 MAY	Website Costs		471.24	34,539.24

22958.4

12386.87

Will to Give

Northern Ireland - Charity number 102633

Accounts

Opening Bank Balance as at 1.4.2022	£16,994.28
Add Net surplus	£15,772.22
Closing Balance	<u>£32,766.50</u>
Bank Statement balance as at 22.3.2023	£32,471.50
Add lodgemnt to be confirmed	£295.00
Reconcilled Statement balance as at 31.3.2023	<u>£32,766.50</u>
Variance	<u>£0.00</u>


 IVAN E. MONTAYA MBE
 31/1/2024

	Professional Services	Insurance	EXPENDITURE Sector Matters/NICVA	Website	Conference	INCOME	
						Membership	Grants
01.04.22 Professional	966.39						
11.04.22 Member		92.53				295	
14.04.22 Insurance						695	
28.04.22 Member						295	
29.04.22 Member						295	
29.04.22 Member						295	
29.04.22 Member						695	
05.05.22 Member						295	
05.05.22 Member	966.39					295	
06.05.22 Professional						295	
09.05.22 Member						295	
10.05.22 Member						295	
10.05.22 Member						295	
10.05.22 Member						295	
12.05.22 Member						695	
13.05.22 Member						295	
13.05.22 Member						695	
16.05.22 Member						695	
16.05.22 Insurance		92.53					
17.05.22 Member						695	
17.05.22 Member						695	
18.05.22 Member						295	
20.05.22 Member						695	
20.05.22 Member						695	
20.05.22 Member						695	
20.05.22 Member						295	
23.05.22 Member						695	
25.05.22 Member						695	
27.05.22 Member						695	
30.05.22 Member						295	
30.05.22 Member						295	
31.05.22 Member						295	
01.06.22 Member						295	
06.06.22 Member						695	
07.06.22 Member						695	
07.06.22 SECTOR MATTERS			30				
07.06.22 Professional	966.39						
07.06.22 Website				440.42			
08.06.22 Member						695	
10.06.22 Member						695	
10.06.22 Member						295	
14.06.22 Member						295	
14.06.22 Insurance		92.53				695	
23.06.22 Member						695	
24.06.22 Member							
04.07.22 Professional	966.39						
04.07.22 SECTOR MATTERS			6000				
04.07.22 SECTOR MATTERS			1200				
05.07.22 Member						695	
05.07.22 Member						695	

[illegible]

Will to Give

Northern Ireland - Charity number 102633

Annual report

Chairpersons Report for the 2022-2023 AGM

Held on 12th November 2023 via Zoom

A warm welcome to all our members and a special welcome to representatives from our new member charities attending their first Will to Give AGM.

This AGM comes hot on the tails of our AGM in February 2023 and the EGM in March 2023.

During the period of the pandemic our AGMs had got progressively later, so this year we are holding the AGM 8 months after the year end, with the plan to hold the 23/24 AGM in June 2024 – 3 months after the year end to get us back on track for future AGMs.

As many of you will remember we were unable to appoint either a Vice Chair or Chair at our AGM in February necessitating an EGM in March.

During the intervening period we had some frank and honest discussions around the future of Will to Give and how we keep momentum going.

I agreed to undertake the role of Chair on an interim basis conscious of my limited capacity to offer the role the time it deserves and also the conflict of interest with Claire supporting the charity in a freelance capacity. Separation of duties were put in place by the committee to mitigate this.

A key part of the transition plan being that Brian would be stepping in as Vice Chair to get a better understanding of Will to Give and to take up the Chair role at the next AGM. Brian brings with him significant experience in committee management, but was keen to get a better understanding of Will to Give and our committee, being still relatively new to the organisation.

We had hoped that we were entering a period of relative stability with Will to Give with a full Committee and each officer bearer role filled and I would like to take this opportunity to thank the Committee members for their hard work and input during my time as Chair.

However, unfortunately that relative calm has been short lived, a reflection of the continuing state of flux and in some cases, it has to be said, turmoil in the third sector.

We have 3 members of the committee that have stepped down and 1 on maternity leave.

We also faced significant and continued issues with our bank trying to update the mandate, which took a huge amount of time to sort for all involved – but thank you to Clare and Nicola for your tenacity in getting this sorted for us. Sadly due to changes in the committee we will have to begin this process again – hopefully it will not prove as arduous this time around.

However, it's not all bad news, Michael continues to be our stalwart and we are hugely thankful for his guidance and support to Will to Give and to all our member charities and of course for allowing us to use the CFR offices.

We also continue to rely heavily on the support of Claire in her role as Development Support Officer, and she has once again played a vital role in keeping the organisation moving forward through these turbulent times, with a lot of work both behind the scenes and at our meetings and events.

So, a huge thank you to Michael, Claire and our committee members for their efforts.

The Committee also held a strategy meeting earlier in the year and during this time we agreed to re-introduce Will to Give week and offer more training to our members.

Membership 2023/24

2023 continues to be another year of challenges to the charity sector so we have seen movement within the membership but also we are delighted to welcome some new charities and hope that this platform helps to develop your legacy income stream within your own organisations.

27 tier 1 members

28 tier 2 members

With 12 members cancelling their membership at the end of March 2023.

Wills Notification Service

We had been enjoying a good period with the Wills notification service where resource continuity within NICVA had led to stability in receiving the notifications. However, in the last 2 quarters, we have had challenges with the Probate Office who had decided to send the Wills on a quarterly basis – we have requested that this be returned to a monthly service.

Finance

After an exhausting time with Ulster Bank, I would like to thank Clare for stepping in as Treasurer since the beginning of the year. Unfortunately, Anna was not able to take up her role as Treasurer so we will now be appointing a new treasurer at this AGM and begin again the job of updating the mandate.

Other Activity

I'm not going to cover too much of the activity as this should rightfully be reported at the next AGM as it falls in to the 2023/2024 year.

However, I would just like to touch on our training events that we have held that have received great feedback – huge thanks to Deborah at Marie Curie and Chris Millward for delivering those and how pleased I am to see the reintroduction of Will to Give week and look forward to seeing it grow.

We are also really looking forward to welcoming Kathryn Horsley from Legacy Foresight at our next meeting to get an update on our legacy data from Northern Ireland.

CLOSE

In conclusion the last few months has been quite challenging for Will to Give. However, that said, I have very much enjoyed my time as interim chairperson and would encourage any of you who have been thinking about joining the committee to step forward at today's AGM.

I will be staying on the committee and look forward to working with new and old members as we continue our attempts to get the charity back on the path to growth and development.

Thank you.

Will to Give

Northern Ireland - Charity number 102633

Annual return

Independent Examiner's report to the charity trustees of Will to Give

I report on the Income and Expenditure Accounts of Will to Give for the year ended 31/3/2023, a Charity that is not a Limited Company.

Respective responsibilities of charity trustees and examiner.

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the Charities Act (Northern Ireland) 2008.

It is my responsibility to:

- examine the accounts under section 65 of the Charities Act
 - follow the procedures laid down in the general Directions given by the Commission under section 65(9)(b) of the Charities Act
 - state whether particular matters have come to my attention
- Basis of independent examiner's report

I have examined your charity accounts as required under section 65 of the Charities Act and my examination was carried out in accordance with the general Directions given by the Charity Commission for Northern Ireland under section 65(9)(b) of the Charities Act.

My examination included a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also included consideration of any unusual items or disclosures in the accounts and seeking explanations from you as charity trustees concerning any such matters.

My role is to state whether any material matters have come to my attention giving me cause to believe:

1. That accounting records were not kept in accordance with section 63 of the Charities Act
2. That the accounts do not accord with those accounting records
3. That the accounts do not comply with the accounting requirements of the Charities Act
4. That there is further information needed for a proper understanding of the accounts to be reached

Independent examiner's statement

I have completed my examination of the final version of accounts for FYE 31.3.2023 and have no concerns in respect of the matters (1) to (4) listed above and, in connection with following the Directions of the Charity Commission for Northern Ireland, I have found no matters that require drawing to your attention.

Name: Ivan E. McMinn MBE

Relevant professional qualification or body: MIB

Address: 384 Belmont Road, Belfast, BT4 2NF

Date: 31.01.24


IVAN E. McMinn MBE
31/1/2024

Will to Give

Northern Ireland - Charity number 102633

Accounts

Will to Give – Income and Expenditure April 2021 – March 2022

Income 21/22

Subscriptions & membership fees	£17,457.00
Fees for charitable services	£0
Grant income	£6,240
	<u>£23,697.00</u>

Expenditure 21/22

Conference & training expenses	£1,540.00
Professional services	£9,724.13
Promotional Material	£0.00
General Expenses	£397.10
Sector Matters	£7,230.00
Insurance	£1,009.51
	<u>£19,900.74</u>

Net Surplus/Deficit	<u>£3,796.26</u>
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Funds brought forward April 1st 2021	£22,451.89
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Funds carried forward March 31st 2022	£26,248.15
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Sharon R Kennedy
FCA

Will to Give

Northern Ireland - Charity number 102633

Annual report

Chairpersons Report 2022

A warm welcome to all our members and a special welcome to representatives from our member charities to their first Will to Give AGM.

Thank you to our existing members with special thanks to Coleen Tinnelly as Vice Chair, Anna Morton as Treasurer and Sarah Leeman as Secretary. Also to committee members Clare Galbraith, Mark McMahon, Natalie Metz, Jonathan Smyth and Julia Smith. As committee members we greatly appreciate you giving of your time freely to continue to maintain and develop the organisations aims.

Our special advisor Michael Graham continues to offer us guidance and supports all our endeavours. We are eternally grateful and appreciative of the time he gives to Will to Give. Thank you for making the office of Cleaver Fulton Rankin available to use for meetings each year.

Our Development Officer Claire Smyth continues to be an invaluable member of the team. We will mention later the fantastic Future Kindness Event which Claire skilfully organised and helped to deliver. Our monthly meetings are an important part of the Will to Give membership benefits and we are thankfully for Claire's organised approach to hosting, securing speakers and distributing information useful for us all both at the meeting and through our social media channels.

To everyone who attended our meetings through another busy and tumultuous year within the charity sector, thank you for your engagement.

I would like to offer my thanks to all members and Claire for supporting me as Chair through the year. It is with regret that I will be stepping down this year however I would encourage all members to consider any of the committee posts to help insure the future of this great collaboration.

Membership

Up to date membership figures will be included in the Financial Report.

2022 was another year of challenges to the charity sector so we have seen movement within the membership but also we are delighted to welcome some

new charities and hope that this platform helps to develop your legacy income stream within your own organisations.

Future Kindness Event

I think that we can all agree that the 1st Future Kindness Event which we ran on 7th November 2022 was an overall success. The event was well attended by both member organisations but also in the afternoon by non-member organisations and guests from our organisations. The event covered everything from legacy administration, building case studies, marketing, stewardship and we took a delve into the Northern Ireland Legacy Landscape as it stands now.

There are many highlights from the event, but I think we can all agree that having Master Hardstaff in attendance and becoming a great fan of Will to Give was a major achievement and hopefully one that we will benefit from moving forward.

Thank you to everyone who hosted a session, invited guest speakers, suggested the event topics and attended. A special thank you must be given to Claire, without you this event just would not have happened.

Like all great events, lessons were learnt however the general consensus through feedback is that we should run the event again in the coming years. So watch this space for me details.

Wills Notification Service

We have seen a great improvement within the wills notification service where due to resource continuity within NICVA has led to stability in receiving the notifications. During the year we have continued to keep communication lines open, building on our relationship with NICVA/Sector Matters.

Finance

We have had a very troubled year in the administration of our banking arrangements with Ulster Bank. We hope that the problems with online access will soon be resolved. To anyone this has impacted we would like to express our thanks for your patience and understanding.

Special Projects

Legacy Foresight

We have a great relationship with Legacy Foresight which has been cultivated over a number of years. As we continue to inform Legacy Foresight of the data from Northern Ireland, it was of great reward to see this information used in Kathryn Horsley's session at our Future Kindness event.

NI Legacy Landscape

The NI Legacy Landscape data project is ongoing. We are collating the relevant information from the Wills Notification service and we will continue with this through 2023.

CLOSE

In conclusion 2022 was an empowering year for Will to Give. We have maintained a good membership level, gained further insights into the legacy sector in Northern Ireland, hosted an inaugural NI legacy focused event and supported many of our members in dedicating new focus into the gifts in wills income stream for their charity. Through all members desire to increase legacy pledges from supporters within our communities, together we will shape the NI legacy landscape now and into the future.

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Basis of independent examiner's report

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Independent examiner's statement

I have completed my examination and have no concerns in respect of the matters (1) to (4) listed above and, in connection with following the Directions of the Charity Commission for Northern Ireland, I have found no matters that require drawing to your attention.

Name : Sharon Kennedy

Relevant professional qualification or body : FCA

Address : Assisi Animal Sanctuary, 1 Old Bangor Road, Newtownards, BT23 7PU

Date : 17/04/23

A handwritten signature in black ink that reads "Sharon R Kennedy FCA". The signature is written in a cursive style, with the first letters of the first and last names being capitalized and prominent.