

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.

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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.