

**MARGARET PYKE TRUST**

**COMPANY LIMITED BY GUARANTEE**

Registered company no. 03438741

Registered charity no. 1064672

**TRUSTEES' ANNUAL REPORT AND FINANCIAL STATEMENTS**

**FOR THE PERIOD ENDED 31 MARCH 2022**

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**MARGARET PYKE TRUST**

(A company limited by guarantee)

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**REPORT AND FINANCIAL STATEMENTS  
FOR THE PERIOD ENDED 31 MARCH 2022**

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**CONTENTS**

<b>Reference and administrative information</b>	<b>1</b>
<b>Trustees' annual report</b>	<b>2</b>
<b>Independent auditor's report</b>	<b>21</b>
<b>Statement of financial activities</b>	<b>25</b>
<b>Balance sheet</b>	<b>26</b>
<b>Statement of cash flows</b>	<b>27</b>
<b>Notes to the financial statements</b>	<b>28</b>

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### REFERENCE AND ADMINISTRATIVE DETAILS OF THE COMPANY, ITS TRUSTEES AND ADVISERS FOR THE PERIOD ENDED 31 MARCH 2022

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<b>Registered name</b>	Margaret Pyke Trust
<b>Company number</b>	03438741
<b>Charity number</b>	1064672
<b>Registered office</b>	The Archway Centre 681-689 Holloway Road London, N19 5SE
<b>Trustees</b>	Ruth McNeil (Chair of Trustees) Anthony Burrell (died 2 March 2022) Sophie Copeman Amanda Kamin Anne-Sophie Lendrevie (resigned 4 July 2022) Professor Susannah Mayhew Patrick Salaun Professor Judith Stephenson
<b>Chief executive officer</b>	David Johnson
<b>Company secretary</b>	Nataliya Cuttell
<b>Independent auditor</b>	Knox Cropper LLP 65 Leadenhall Street London, EC3A 2AD
<b>Bankers</b>	CAF Bank Limited 25 Kings Hill Avenue Kings Hill, West Mailing Kent, ME19 4JQ
<b>Investment managers</b>	Schroder & Co. Limited, trading as Cazenove Capital 1 London Wall Place London, EC2Y 5AU

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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The Trustees present their annual report and financial statements for the 1 March 2021 to 31 March 2022 period. During the reporting period, the Trustees changed the Trust's financial year-end from 28 February to 31 March, so this report covers a 13-month period. The financial statements have been prepared in accordance with the accounting policies set out in note 1 of the accounts. They comply with the charity's governing document, the Charities Act 2011, and the Accounting and Reporting by Charities: Statement of Recommended Practice ("**SORP**"), applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland as published on 16 July 2014.

#### STRUCTURE, GOVERNANCE AND MANAGEMENT

##### Constitution and governing document

The Margaret Pyke Trust (the "**Trust**") is a registered charity, number 1064672, and is constituted under Articles of Association, passed by special resolution on 4 February 2020. The Trust has been a pioneering charity in sexual and reproductive health for over half a century, having taken over the undertaking of the previous Margaret Pyke Memorial Trust (registered charity number 1041742) on 1 January 1998.

The governance of the Trust is the responsibility of the Board of Trustees. Day to day management is delegated to the Trust's Chief Executive, who draws on the support and expertise of the Trustees, and a number of specialist sexual and reproductive health clinicians, demographers and other consultants.

##### Method of appointment or election of the Board of Trustees

Trustees are elected under the terms of the Articles of Association. The Trust has a Board of six eminent Trustees.

In deeply sad news, in March 2022, the Trust's energetic, knowledgeable, strategic and successful Chair, Anthony Burrell, died. Anthony's great grandmother, Lady Denman, was one of the founders of the Family Planning Association, and Margaret Pyke was Anthony's father's godmother. Among the many losses that have resulted from Anthony's death is the ending of the 53-year period when the Trust had a familial connection with Margaret Pyke. The greater loss, however, is the loss of such a popular and important member of the team. Shortly after Anthony's death, Ruth McNeil was appointed Chair and Sophie Copeman appointed as Vice-Chair.

In further sad news, the Trust's Patron, Martha Campbell, also died in the reporting period. In the 1990s Martha directed the Packard Foundation's population and reproductive rights programme. In 2000, she created Venture Strategies, which for over two decades has championed the removal of barriers to family planning and today has a particular focus on the Sahel. Martha, a long-time lecturer at Berkeley, was exceptionally widely published, including the first comprehensive review of barriers

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## **MARGARET PYKE TRUST**

(A company limited by guarantee)

---

### **TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)**

**FOR THE PERIOD ENDED 31 MARCH 2022**

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to family planning. She was also a trustee of World Health Partners in New Delhi, and the African Institute for Development Policy in Nairobi.

No other person or external body is entitled to appoint any Trustees. The Trustees who served during the period and after the period-end are shown on page 1.

#### **Policies adopted for the induction and training of the Board of Trustees**

The Chair and Chief Executive are primarily responsible for briefing new members of the Board of Trustees. As part of the induction process for new Trustees, such new Trustees are briefed on: (a) the history, values and ethos of the Trust; (b) all existing policies of the Trust; (c) the Trust's existing and planned programmatic and advocacy actions; and (d) the Trust's strategic plan.

#### **Related party relationships**

The Trust has considered the disclosure requirements of the SORP for related party relationships. The Trust has no related party connections with other organisations. The Trustees consider the members of the Board of Trustees and their close connections to be the Trust's only related parties. All Trustees give their time voluntarily and receive no benefits from the Trust of any kind. No expenses were claimed from the Trust by any Trustees in the reporting period.

Trustees are required to disclose all relevant interests and register them with the Chair of Trustees and to withdraw from decisions where a conflict of interest arises.

#### **Remuneration policy for key management personnel**

Staff remuneration is reviewed annually. The Trustees review the remuneration of key management personnel, and draw on their knowledge of the sector, the formal appraisal process, and common practice in other charities of similar size, to ensure that the remuneration set is fair and not out of line with that generally paid for similar roles.

#### **Risk management**

The Board of Trustees fully accepts its responsibilities for ensuring that the major risks to which the Trust is exposed are identified, and that there are systems and procedures in place to minimise and manage those risks. The Board of Trustees considers whether the Trust is exposed to additional or differing levels of risk at every Board meeting. The Trust's suite of policies was extensively reviewed and enhanced in the reporting period. New policies were developed and finalised on: Conflicts of interest; Diversity, equity and inclusion; Modern slavery; and Procurement. Existing policies which were substantively updated included: Anti-bribery, corruption and fraud; Complaints; Data protection; Disciplinary and capability; Equal opportunities; Grievance; Financial management; IT and communications systems; Open information; Reserves; Safeguarding; Travel & other expenses;

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT) FOR THE PERIOD ENDED 31 MARCH 2022

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Volunteers; and Whistleblowing.

#### OBJECTIVES AND ACTIVITIES FOR THE PUBLIC BENEFIT

##### Purposes as set out in the Trust's governing document

The Articles of Association provide that the Trust's objects (the "**Objects**") are:

- Implementation of project activities, training activities, education activities, research activities, communication activities, publicity activities and advocacy activities which promote, support and advance universal access to sexual and reproductive health information, rights, and services in all parts of the world, including but not limited to rights-based voluntary family planning and contraception information and services;
- Coordinating, running, managing and/or joining any other form of network or alliance;
- Undertaking any activity to further the vision of a world where everyone can choose freely whether and when to have children, and how many, for the benefit of all people and the planet;
- Seeking greater understanding of sexual and reproductive health and rights and voluntary family planning as an essential component of sustainable development within the international development context and otherwise;
- Promoting sexual and reproductive health and rights, women's rights, education activities, livelihood generation activities, and Population, Health & Environment and other integrated development models. Highlighting the important connections between the former topics and climate change, environmental conservation and population dynamics (including but not limited to population growth, birth, death, immigration and emigration rates). Undertaking advocacy and fundraising activities relating to these and related sectors and the implementation, with partners or alone, of projects on the ground responding to these challenges;
- Influencing international, regional and domestic policy to further the Objects and, when reasonably necessary to do so, to seek all formal and informal memberships, accreditations and other forms of recognition which would further the Trust's ability to undertake such work, be they memberships, accreditations or any other form of recognition with national government(s), international bodies including but not limited to the United Nations, civil society groupings or otherwise;
- Undertaking education and training activities with the public and professionals from all areas of expertise, including but not limited to healthcare professionals in the theoretical, practical, historical and all other aspects of sexual and reproductive health, family planning, contraception, all other related health fields and the linkages between those and other development fields; and

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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- The advancement and promotion of medical education and research generally.

#### **Main activities undertaken in relation to these purposes**

The main activities of the Trust, to further these purposes, fall into three categories:

- Working to change policies of global alliances, governments, NGOs and others on the critical importance of removing barriers to voluntary and rights-based family planning for the benefit of both human and environmental health, and making the connections between the climate and biodiversity crises, and the importance of universal access to sexual and reproductive health services;
- Training of clinicians in sexual and reproductive health; and
- Developing projects with partner organisations which integrate activities improving sexual and reproductive health, with activities improving local environmental health.

In the "Achievements and Performance" section below, the activities undertaken in the reporting period are divided into "Policy", "Sexual & Reproductive Health Training" and "Integrated Human & Environmental Health Programming".

#### **Public benefit**

The Trustees have a duty to develop strategic plans to ensure provision of public benefit and the achievement of the objectives set out in the Trust's governing document. The Trustees referred to the Charity Commission's general guidance on public benefit when developing the Trust's current strategic plan and when considering all current and future activities.

#### **Strategic plan**

The Trustees consider progress against the current strategic plan (which runs until February 2023) at each Trustees' meeting. During the current strategic plan period, the Trust's primary objective (the "**Advocacy Objective**") is to effect policy changes, so that barriers to family planning are deemed environmental conservation issues. The Trust's secondary objectives are to implement international projects and undertake sexual and reproductive health training supporting the Advocacy Objective. The review and updating of the Trust's strategy is a key priority in period following the reporting period.

### **ACHIEVEMENTS AND PERFORMANCE: POLICY**

#### **Introduction**

The Trust's primary strategic objective is to effect policy changes, so that the importance of removing

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## **MARGARET PYKE TRUST**

(A company limited by guarantee)

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### **TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)**

**FOR THE PERIOD ENDED 31 MARCH 2022**

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barriers to family planning is given due attention as part of the response to the climate and biodiversity crises. The Trust has "observer status" and membership of a range of reproductive health, climate and biodiversity alliances. The Trust can therefore effect policy change using genuinely cross-sectoral knowledge, networks and alliances.

#### **International Union for Conservation of Nature (IUCN)**

The IUCN is the world's largest and most diverse environmental network, harnessing the experience, resources and reach of its 1,300 member organisations and the input of some 13,000 experts. It is the global authority on the status of the natural world and the measures needed to safeguard it. The Trust is the only member of the IUCN with over fifty years' family planning expertise and therefore brings a unique perspective.

In September 2021, the Trust was an active participant at the IUCN World Conservation Congress, hosting the event, "Healthy wetlands for the cranes and people of Rukiga, Uganda" and the e-speaker pitch "Removing Barriers to Family Planning Empowering Sustainable Conservation in the SDG era".

Subsequent to the IUCN World Conservation Congress, the Trust led the launch of the IUCN Biodiversity & Family Planning Task Force, a direct result of the change to global conservation policy achieved in the previous reporting period when the Trust's motion, "Importance for the conservation of nature of removing barriers to rights-based voluntary family planning" was voted through, with landslide support. The Task Force is the first and only IUCN entity focussed exclusively on the connections between reproductive and environmental health, and is the IUCN Task Force with the greatest emphasis on human health. The Trust chairs the Task Force which, in the reporting period, established six working groups to commence the process of supporting IUCN and IUCN members develop guidance on how and why removing barriers to rights-based voluntary family planning can strengthen conservation outcomes.

During the reporting period, four of the Trust's staff were active members of two IUCN Commissions (the Species Survival Commission and the Commission on Environmental, Economic and Social Policy) as well as the Trust being represented on the IUCN National Committee UK's Executive Committee.

#### **United Nations Framework Convention on Climate Change (UNFCCC)**

The UNFCCC is the international environmental treaty adopted and implemented by countries in 1994 to address the issue of climate change. The Trust, with its focus on removing barriers to family planning, is unusual in having UNFCCC "observer status".

At the COP26 Climate Change Conference in Glasgow, the Trust hosted two events. The Trust's main event was held in partnership with MSI Reproductive Choices and UNFPA (the UN agency working to improve reproductive and maternal health worldwide). This event was the first time, in twenty-six



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## MARGARET PYKE TRUST

(A company limited by guarantee)

---

### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT) FOR THE PERIOD ENDED 31 MARCH 2022

---

UNFCCC COPs, that UNFPA had ever hosted or co-hosted a COP event. The event, "Removing barriers to health and education: An essential adaptation and resilience strategy" engaged global experts in a high-level discussion on why removing barriers to family planning and girls' education is crucial to accelerating climate adaptation and resilience and was moderated by CNN Chief International Correspondent, Nima Elbagir. Speakers included government ministers from three countries, the Executive Director of UNFPA, youth advocates and other representatives of civil society. The Trust's event was also used as the launch event for Project Drawdown's publication, "Girls' education and reproductive health: essential components of climate adaptation and resilience". This publication, drafts of which were reviewed by the Trust, is perhaps the most comprehensive publication stating the evidence on this topic.

The Trust's second event at COP26 was held in partnership with new partners, Care International, Vietnamese NGO Centre for Sustainable Rural Development and ClimateNet, as well as FHI 360. The Trust was able to promote its work advocating for change to climate policy, highlighting that with just 0.5% of the targeted \$100 billion annual sum to help developing countries respond to climate change, everyone who wants contraception could access it, including those on the frontline of the climate crisis.

COP26 enabled the Trust to develop a longer-term plan to seek to change climate policy, and build strong relationships with new partners. The results of the Trust's work to change climate funding criteria will be revealed in the next reporting period.

#### **Family Planning 2030 (FP2030)**

FP2030 is the only global partnership centred solely on family planning. FP2030 is the successor to FP2020, the global initiative that ran from 2012 to 2020, with the goal to enable an additional 120 million women and girls to use modern contraception by 2020. The Trust was an "FP2020 Commitment Maker" from 2016 until the transition from FP2020 to FP2030 was completed in the reporting period. FP2020 emerged as a central platform for family planning, providing an unparalleled space for stakeholders to convene, align, share knowledge, broker resources, and advance the field and FP2030 builds on and expands that work.

In March 2021, the Trust's "FP2030 commitment" was announced by the Executive Director of FP2030, Dr Samukeliso Dube, during the sixth-fifth session of the United Nations Commission on the Status of Women ("CSW"). CSW is the principal global intergovernmental body exclusively dedicated to the promotion of gender equality and the empowerment of women. By announcing the Trust's FP2030 commitment (which focuses on increasing the number of policies and publications recognising the critical importance of the removal of barriers to family planning as a pillar of climate and biodiversity action) at CSW, the Trust was able to advance the cross-sectoral nature of its work.

Throughout the reporting period, the Trust has supported FP2030 in its work promoting the importance of the removal of barriers to family planning as part of climate policy. This included providing advice to FP2030, participating in FP2030's "Emergency Preparedness and Response Strategy Review" and

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## **MARGARET PYKE TRUST**

(A company limited by guarantee)

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### **TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)**

**FOR THE PERIOD ENDED 31 MARCH 2022**

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supporting the event "Building Forward Better: Advancing SRHR for Climate Adaptation and Resilience".

#### **Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES)**

IPBES is the intergovernmental organisation established to improve the interface between science and policy on issues of biodiversity and ecosystem services. IPBES performs a similar role, in the biodiversity field, to that which the Intergovernmental Panel on Climate Change performs in its field.

In the reporting period, the Trust's application for IPBES "observer status" was successful, building on the Trust's approach to engage at a formal level with a wide range of reproductive health, biodiversity and climate change alliances.

#### **United Nations Environment Assembly (UNEA)**

UNEA is the leading authority that sets the global environmental agenda, promotes the coherent implementation of the environmental dimension of sustainable development within the United Nations system, and serves as an authoritative advocate for the global environment. The Trust has accreditation as an observer to the governing body of UNEA.

In the reporting period, the Trust built an alliance of UNEA accredited organisations, which sought to raise the profile of barriers to family planning as a conservation issue at the fifth session of the UN Environment Assembly.

#### **UK government**

As a UK-based NGO, the Trust participates in UK government consultation exercises and engages UK government departments to promote the importance of removing barriers to family planning within climate and biodiversity policy. In the reporting period, the Trust engaged four UK government departments on this work.

In June 2021, the Trust launched its campaign with the aim of changing the criteria in UK government climate funding mechanisms to expressly cover programmes that remove barriers to family planning. 66 organisations directly supported the Trust's campaign, which gained significant media coverage, led to four questions being tabled in the House of Commons, direct engagement with government ministers, and the Trust briefing the All-Party Parliamentary Group on Population, Development and Reproductive Health. Formal responses from the UK government indicate that funding family planning programming under UK government climate mechanisms may well be opening up.

In February and March 2021, the Trust was one of many NGOs active in the successful campaign to support an amendment to the Health and Care Bill reversing the government's earlier decision to end access to the telemedical pathway to abortion. As a result of this successful campaign, telemedicine

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## **MARGARET PYKE TRUST**

(A company limited by guarantee)

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### **TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)**

**FOR THE PERIOD ENDED 31 MARCH 2022**

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for early abortion care remains an option in England, resulting in improved access to essential reproductive healthcare for girls and women.

#### **Convention on Biological Diversity (CBD)**

CBD has three main objectives; the conservation of biological diversity, the sustainable use of the components of biological diversity, and the fair and equitable sharing of the benefits arising out of the utilisation of genetic resources. In the reporting period, the Trust monitored the UK government's approach to CBD as part of the CBD Stakeholder Group.

#### **Conservation Measures Partnership (CMP)**

The CMP is an international community of conservation-oriented NGOs, government agencies, funders, and private businesses that work collectively to guide conservation globally. Throughout the reporting period, the Trust supported CMP's activities to inform and educate conservation practitioners about Population, Health & Environment programmes, their theories of change, how to monitor and evaluate such projects, and generally worked to build the capacity of conservationists to learn about barriers to family planning.

#### **UK Sexual and Reproductive Health and Rights Network (the Network)**

The Network brings together UK based organisations working on sexual and reproductive health and rights, and coordinates interaction between member organisations and the UK government. The Trust is a long-term member and, during the reporting period, was represented on the Network's Steering Committee. The Trust contributed to the Network's activities responding to the UK government's cuts to overseas development aid, the "Just the numbers campaign" and activities to ensure only rights-based indicators are included in UK government funded programmes.

#### **Ad hoc advisor**

In the reporting period, the Trust supported the work of others in numerous ways, for instance by:

- Undertaking independent reviews of draft publications for partner organisations, including Project Drawdown and CHASE Africa;
- Providing strategic advice to governments (such as Norway) and donor partners on the evidence connecting barriers to family planning, climate change adaptation and resilience building and biodiversity;
- Hosting learning events, such as the virtual training session for the Conservation Coaches Network of Africa and Madagascar and the Trust's event "What's new in the world of Population, Health and Environment?" which was developed for the Africa Biodiversity Collaborative Group;

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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and

- Actively supporting campaigns, such as the Climate Action Network's call on governments to fulfil the commitment to mobilise \$100bn a year for climate finance for 2020-2025.

#### Alliances and memberships

The Trust is a member of the following groupings and has engaged with them in the reporting period whenever appropriate:

- Sexual and Reproductive Health & Rights and Climate Justice Coalition. The Coalition is a global network of more than 25 civil society organisations committed to collective action and coordinated advocacy to advance sexual and reproductive health and rights and gender equality in the context of climate change from an intersectionality and climate justice approach;
- Bridge Collaborative. Chaired by The Nature Conservancy, the Bridge Collaborative brings together a variety of groups working to bridge the gap between population, food security, climate change and other priority international development issues; and
- Planetary Health Alliance. Based at Harvard University, the Alliance brings together academia, research institutes and civil society to grow the field of inter-sectoral thinking and action on human and planetary health.

#### ACHIEVEMENTS AND PERFORMANCE: SEXUAL & REPRODUCTIVE HEALTH TRAINING

The Trust undertakes training in the United Kingdom and Uganda. In the reporting period, the Trust trained 1,768 clinicians, nursing school students and peer educators on sexual and reproductive health issues (2021: 539).

##### Introduction: Uganda

In the reporting period, the Trust significantly increased its activities in Uganda, compared to the previous reporting period. The Trust's Ugandan training activities focus on implementing the Trust's Uganda Sexual Health and Public Education ("USHAPE") programme, a sexual and reproductive health training and service improvement model designed for rural Ugandan healthcare facilities. USHAPE is accredited by the Uganda Protestant Medical Bureau ("UPMB"), the umbrella organisation under which the majority of the Trust's Ugandan partner hospitals and health centres operate.

The aim of USHAPE is to reduce unmet need for family planning. As defined by the World Health Organization, women with unmet need are those who are fecund and sexually active but are not using any modern method of contraception, and report not wanting any more children or wanting to delay the next child. The concept of unmet need points to the gap between women's reproductive intentions

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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and contraceptive use.

During the reporting period, the Trust developed additional USHAPE training modules, including a new module for "Village Health Teams" (community peer educators who assist in mobilising remote and rural communities to attend outreach clinic services). As part of USHAPE, "VHT" peer educators can also now be trained to counsel neighbours on family planning, to dispel myths and misconceptions, as well as to undertake community talks in churches and other settings, in order to raise awareness of family planning and its local availability. The Trust developed this module as a response to data in relation to unmet need generated at Bwindi Community Hospital.

In the reporting period, 469 (2021: 135) staff, nursing school students and VHTs undertook USHAPE training. The total number of training hours received amounted to 19,698 (2021: 4,050). The dramatic increase in training activity, compared to the previous reporting period, is because of the expansion to new healthcare facilities and the relaxation of pandemic restrictions that prevented many training activities from taking place in the previous reporting period.

#### Partnership with Bwindi Community Hospital, Uganda

In the reporting period, the Trust continued to support Bwindi Community Hospital to embed USHAPE. Bwindi Community Hospital is a 112-bed hospital serving an area of around 100,000 people in rural south-west Uganda, close to the border of the Democratic Republic of Congo. The importance of USHAPE has been highlighted in the last two reporting periods, a period when pandemic restrictions in Uganda prevented travel, contributing to an increase in unmet need from 11% in 2019 to 21% in 2021. The Ugandan national average is around 30%, so prior to the Covid-19 restrictions, USHAPE had contributed to lower levels of unmet need in communities served by the hospital, compared to the national average, even though Bwindi Community Hospital serves a marginalised rural community.

In the reporting period, the Trust funded, trained, and mentored the hospital's full-time Margaret Pyke Nurse. Among other outputs, in the reporting period this led to:

- The training of 114 (2021: 115) Bwindi Community Hospital Nursing School students and staff, receiving 4,788 (2021: 3,450) hours of training;
- 104 (2021: 94) community outreach sessions being undertaken, with 14,064 (2021: 10,374) hours of family planning and other health education received by community members;
- 1,096 (2021: 1,096) hours of family planning education delivered to patients and visitors in seven hospital departments;
- The training of 118 peer educator VHTs amounting to 800 hours of training;
- Local radio talk shows featuring Q&A sessions for community members to phone-in with their

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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sexual and reproductive health questions, reaching around 63,000 people; and

- 2,329 users of family planning receiving improved services.

#### Partnership with Kisiizi Hospital, Uganda

In the reporting period, the Trust continued to support Kisiizi Hospital to implement USHAPE. Kisiizi Hospital is a 260-bed hospital serving a population of 150,000 in south-west Uganda, a two-hour drive north of Kabale on poorly maintained, unmetalled roads. Kisiizi Hospital is situated in a region where unmet need has been calculated at around 20%, but where the rate will actually be higher due to the impact of the pandemic on service delivery and obstacles to patients accessing health services.

In the reporting period the Trust funded, trained, and mentored the hospital's full-time Margaret Pyke Nurse. Among other outputs, this led to:

- 158 (2021: 20) Kisiizi Hospital staff and Nursing School students undertaking USHAPE training, receiving 4,740 hours (2021: 600) of training;
- 55 (2021: 9) community outreach sessions, benefiting 2,130 (2021: 158) community members, with around 1,065 (2021: 114) hours of family planning education;
- 2,191 (2021: 2,191) hours of family planning education delivered to patients and visitors to seven of the hospital's departments;
- 122 (2021: 162) men reached with targeted family planning messages at male engagement talks, amounting to 183 (2021: 243) hours of education;
- 195 (2021: 160) women receiving cervical cancer screening and follow-up gynaecological services;
- Local radio talk shows featuring Q&A sessions for community members to phone-in with their sexual and reproductive health questions, reaching around 120,000 people; and
- 1,426 users of family planning receiving improved services.

#### Partnership with Rugarama Hospital, Uganda

Rugarama Hospital is a 250-bed hospital serving an area of around 140,000 people in the town of Kabale in south-west Uganda, close to the Rwandan border. In addition to the Darwin Initiative project activities mentioned below, where health services are provided by rural health centres managed by Rugarama Hospital and the Ministry of Health, the Trust also began implementing USHAPE at Rugarama Hospital itself. Rugarama Hospital is in a region with similarly high unmet need figures to

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## MARGARET PYKE TRUST

(A company limited by guarantee)

---

### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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those stated above in relation to Kisiizi Hospital.

In the reporting period the Trust funded, trained, and mentored the Hospital's full-time Margaret Pyke Nurse. Among other outputs, this led to:

- 58 Rugarama Hospital staff participating in USHAPE training, undertaking over 2,400 hours of training;
- Family planning services being provided in six hospital departments, in addition to the family planning department, as was the case pre-USHAPE implementation;
- 939 hours of family planning education being received by patients and visitors to seven hospital departments;
- 525 women reached with post-partum family planning information;
- 355 women receiving cervical cancer screening and follow-up gynaecological services;
- Local radio talk shows featuring Q&A sessions for community members to phone-in with their sexual and reproductive health questions, reaching around 180,000 people; and
- 2,272 users of family planning receiving improved services.

#### Introduction: United Kingdom

In the reporting period, the Trust trained 1,299 clinicians (2021: 404) on sexual and reproductive health ("SRH") matters. These clinicians attended one of the Trust's 45 SRH training courses (2021: 11). The total number of delegate training hours amounted to 4,636 (2021: 1,930).

The dramatic increase in training activities, compared to the previous reporting period, was for two primary reasons. Firstly, the later stages of the pandemic meant National Health Service ("NHS") staff were better able to recommence SRH training. Secondly, the Trust changed the way in which training courses were delivered – being almost exclusively online in the reporting period. It is notable that this shift meant that delegates participated from a much wider geographical area, whereas face-to-face events in previous reporting periods were largely attended by delegates from southern England. It is likely, since delegates find online training time-efficient and convenient, that a return to face-to-face training will be limited.

Addressing the significant shift in the way that medical professionals now update their skills has posed new challenges and opportunities in the reporting period, although the Trust has harnessed the expertise and enthusiasm of its facilitators to design specific training on an ever-growing range of topics. During the reporting period, for instance, the Trust has had particular success in provision of

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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training on emergency contraception, with a new course developed that deals specifically with issues posed by this important topic.

#### **Margaret Pyke Conferences**

In the reporting period, 517 clinicians (2021: 159) attended one of the Trust's nine Margaret Pyke Conferences (2021: two). These landmark Conferences cover contraception and other aspects of sexual health and are recognised by the Faculty of Sexual and Reproductive Healthcare ("FSRH"), a faculty of the Royal College of Obstetricians and Gynaecologists. They are valid for re-certification of the Diploma of the FSRH and for Continuing Professional Development points. Historically, Margaret Pyke Conferences have been full day, in-person events. A legacy of the pandemic is that during the reporting period an insufficient number of delegates wanted to attend in-person training. In the reporting period, the Conferences were for varying durations from one hour to six hours and each Conference was both live-streamed and available by purchasing a recording. The need remains to provide up-to-date knowledge, delivered by inspiring speakers, that enables medical professionals to acquire greater SRH confidence and skills that, in turn, allow them to deliver safe and effective SRH care in community, primary and secondary care settings. Increasingly, this has to be in a time-efficient way that offers value for money.

In the reporting period, 98.5% of Margaret Pyke Conference course delegates who completed the evaluation forms stated they had increased SRH knowledge (2021: 98.5%), 97% stated they had greater confidence to deal with their patients' SRH issues (2021: 98.5%), and 99% stated they would recommend courses run by the Trust to their colleagues (2021: 99%).

#### **SRH Essentials**

The FSRH designed the course SRH Essentials specifically to address the needs of primary healthcare practitioners who have had little or no prior SRH training, but meet patients with SRH needs on a day-to-day basis. The aim is to provide delegates with adequate knowledge and confidence to discuss these matters with patients.

In the reporting period, 292 clinicians (2021: 60) attended one of the Trust's 19 SRH Essentials courses (2021: four). As in the previous two reporting periods, the Trust remained the UK training body responsible for the vast majority of this training nationwide.

Of those SRH Essentials course delegates who completed the course evaluation forms, 99% (2021: 100%) stated that post-course they had increased SRH knowledge, 99% (2021: 99%) stated they had greater confidence to deal with SRH issues, and 100% (2021: 100%) stated they would recommend courses run by the Trust to their colleagues.

The increase in demand for this training is significant, and the Trust has risen to the challenge of meeting this need.



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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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#### Bespoke training

In the reporting period, 490 clinicians (2021: 185) attended one of the Trust's 17 bespoke training courses (2021: five).

Bespoke training currently offers the greatest potential as the Trust is alone in offering to design and deliver training to meet the identified learning needs of an increasingly wide variety of clients seeking SRH training. In the reporting period, the Trust provided its first training course for boarding school nurses, in addition to delivering training to new and returning clients, comprising several Clinical Commissioning Groups, two Community Education Provider Networks, two pharmacy chains offering online contraception provision, and three NHS Foundation Trusts. Subjects covered in bespoke training included:

- Long Acting and Reversible Contraception ("LARC") and non-LARC contraception;
- Emergency contraception;
- Diagnosing and managing sexually transmitted infections;
- Menopause / hormone replacement therapy;
- Sexual history taking;
- Remote consultations (including telemedicine);
- LGBTQI+ sexual health;
- Local SRH service issues; and
- Motivational interviewing.

Of the delegates who completed the evaluation forms, 100% (2021: 100%) stated that they had increased SRH knowledge, 98.5% (2021: 100%) stated that they had greater confidence to deal with SRH issues, and 100% (2021: 100%) stated that they would recommend courses run by the Trust to their colleagues.

#### Conclusion: United Kingdom training

The reporting period has seen dramatic changes to the structure and delivery of UK training, resulting in a wider variety and number of courses reaching a far larger and geographically widespread audience. The clinician delegates are almost exclusively NHS employees whose skills had been

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## **MARGARET PYKE TRUST**

(A company limited by guarantee)

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### **TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)**

**FOR THE PERIOD ENDED 31 MARCH 2022**

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required to respond to the overwhelming need to deal with Covid-19, and who have now largely returned to their former roles. The need for their knowledge to be updated is being addressed, but training budgets are tight and the Trust is mindful that there are increasing options for online learning which are free.

The Trust is proud that in the reporting period it has been so flexible and inventive. The Trust continued to provide the widest range of contraceptive update training courses for clinicians in the UK. The 1,299 clinicians who completed training have clearly benefitted, but of even greater importance is the very significant number of their patients who have received and continue to receive better quality healthcare as a result of the improved knowledge, skills and confidence of those caring for them. Many tens of thousands of patients will have benefited because of this training.

#### **ACHIEVEMENTS AND PERFORMANCE: INTEGRATED HUMAN & ENVIRONMENTAL HEALTH PROGRAMMING**

In the reporting period, the Trust continued to lead the implementation of the project funded by the UK government's "Darwin Initiative". Since its launch in 1992, the UK government has invested hundreds of millions of pounds supporting Darwin Initiative biodiversity conservation projects. The Trust's "Healthy wetlands for the cranes and people of Rukiga, Uganda" project, is the first time the Darwin Initiative had funded family planning service provision.

The wetlands of Rukiga are vital for cranes (for nesting) and people (for food security, flood prevention and livelihoods). The Trust, Rugarama Hospital, the International Crane Foundation/Endangered Wildlife Trust Partnership, and the London School of Hygiene & Tropical Medicine have collaboratively designed a holistic project responding to the connected health, environmental and livelihood challenges faced and identified by the local community. In the reporting period, extensive ethnographic research was undertaken, as part of the project, identifying place-specific human health and environmental issues that community members are experiencing, in addition to the communities' preferred solutions, which led to further adaptation of the project design. The research has highlighted how people see the connections between their health, and the health of their environment, including how local population pressures on land are resulting in ever-increasing fragmentation of farmland resulting in poor livelihood and health outcomes for households.

The research findings have not only been used in relation to the project itself, but have also been used in the Trust's advocacy work. The community perceptions of the strong connections they experience and understand between climate change, barriers to healthcare (including family planning), habitat encroachment, local population growth, pressures on smallholder farmland, pollution, nutrition and livelihoods are striking.

The research findings also led to the Trust redesigning the project to enable the support of an increased number of health centres. As part of this project, the Trust is now supporting four health centres run by the Ministry of Health; the first time the Trust has supported Ugandan government

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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facilities. The Trust is also supporting four Uganda Protestant Medical Bureau rural health centres and providing two mobile clinics in community centres where the villages have no dedicated health centre.

Project partners have fostered excellent relationships with local government and council leaders, with outcomes including the project receiving a donation of approximately 6 hectares of land for the development of a Napier grass nursery, which is now established and being used by community members to help combat soil erosion from hillslopes into the wetlands below. In the reporting period, the Trust's work led to:

- Improved healthcare services being provided in ten health centres (four Church of Uganda-led static clinics, two Rugarama Hospital-led mobile clinics and four government-led facilities);
- Training of 21 clinicians in improved family planning skills, receiving around 900 hours of training. An important outcome in the period was that all delegate clinicians scored over 80% in their final examinations;
- Around 20,000 people receiving improved clinical services, including services focussed on maternal, optical and dental healthcare;
- Over 7,000 people receiving improved family planning services;
- 248 households (benefitting an estimated 1,740 people) being provided with alternative sustainable livelihood support, including agricultural materials, and training on financial management, bookkeeping and improved sustainable farming techniques;
- An increase in Grey Crowned Crane breeding pairs from 15, at project commencement, to 32 by the end of the reporting period;
- 1,066 hectares of wetland, upland and farmland being brought under Community Conservation Agreements (covering the sustainable livelihoods and conservation actions including habitat restoration, and management and monitoring of wetlands and cranes); and
- An increase in water clarity scores from 19, at project commencement, to 61.5 by the end of the reporting period. Water clarity indicates water quality, as clear water contains fewer pollutants such as chemicals and soil.

Towards the end of the reporting period, the Trust commenced discussions with Nature Uganda and the London School of Hygiene & Tropical Medicine on plans to replicate this project in a wetland area of a neighbouring district. Additionally, the UK government's Department for Environment, Food & Rural Affairs selected the project for a "mid-term review", a positive and supportive learning exercise, to enable knowledge sharing across UK government departments and to the conservation sector more widely. The Trust's project was the only Darwin Initiative project selected for such a review, preliminary

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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feedback was extremely positive, we await the final report, which will be used in the Trust's advocacy, highlighting barriers to family planning as a biodiversity issue.

#### ACHIEVEMENTS AND PERFORMANCE: REVIEW OF ACTIVITIES FOR THE PERIOD

The Trustees review the aims, objectives, and activities of the Trust at each Trustees' meeting. In addition to the policy, programmatic and training activities stated above, other work and organisational development in the reporting period included:

- An increase in the Trust's staffing levels. Two new staff in newly created positions (Head of Operations & People and Head of Development) commence their new roles a little after the end of the reporting period;
- The above mentioned resourcing developments have enabled a mild-restructuring, to enable enhanced efficiencies, which will be implemented immediately upon the start date of the new staff;
- Certain improvements to various IT processes and equipment have been successfully implemented;
- Hybrid working patterns have been successfully implemented;
- Frequency of communications with Trust supporters and on social media has increased;
- A variety of remote in-house training for staff has been implemented; and
- A comprehensive review and update of the Trust's policies has formed part of a significant governance audit.

In terms of gender, 6 out of 7 Trustees, and 7 out of 8 staff (including the two staff members' whose start date is imminent) are female.

#### FINANCIAL REVIEW

##### a. Financial Position

The Trust achieved net income of £55,264 (2021 – net expenditure of £70,519), details of which are shown in the Statement of Financial Activities on page 25. This includes net gains on revaluation of investments of £29,583 (2021 – £9,194), and net income from ordinary activities of £25,681 (2021 – net expenditure of £79,713).

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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Total income for the year amounted to £615,291 (2021 - £337,898) and total expenditure before taking account of investment gains or losses amounted to £589,610 (2021 - £417,611).

#### **b. Reserves Policy**

The Trustees have an ethical investment policy. It is the Trust's policy to invest reserves only in a way which integrates environmental, social and governance factors within the investment selection process and assets which support the Paris Agreement on Climate Change by reducing emissions. The Trustees implement this policy by investing in Cazenove Capital's Charity Responsible Multi-Asset Fund.

In the reporting period, the Trustees updated their policy in relation to the quantum of reserves they seek to maintain, as part of the 2022 – 2023 annual budget approval process. Trustees have permitted the use of reserves to the extent to enable staff expansion, whilst retaining not less than six months' expenditure on staff, office and general costs.

#### **c. Going Concern**

After appropriate enquiries, the Trustees consider that the Trust will be able to maintain adequate resources to continue in operational existence for the foreseeable future. For this reason, they continue to adopt the going concern basis in preparing the financial statements. Further details regarding the adoption of the going concern basis can be found in the Accounting Policies.

#### **PLANS FOR FUTURE PERIODS**

The current strategic plan runs until the end of February 2023. Until then, the Trust's primary objective remains to effect policy changes, so that barriers to family planning are deemed environmental conservation issues. In the year ahead, the Trust will:

- Analyse its performance during the current strategic plan period and undertake a comprehensive exercise to revise and update the strategic plan for the next period;
- Work to build on policy successes at IUCN and elsewhere, focussing on increasing the impact of the IUCN Biodiversity & Family Planning Task Force but with a growing focus on complimentary country level work in countries with which the Trust has the greatest number of partner organisations (Uganda and potentially Ethiopia);
- Work to grow the geographical extent of programmatic work in Uganda (both USHAPE and by scaling up the model being implemented with partners in Rukiga District). This will involve working with new partners in additional Ugandan Districts; and
- Continue to innovate with the UK training offering, likely focussing on bespoke training. The

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## MARGARET PYKE TRUST

(A company limited by guarantee)

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### TRUSTEES' ANNUAL REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE PERIOD ENDED 31 MARCH 2022

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plans for the 2022 /2023 financial year anticipate growth in terms of revenue and course numbers compared to the reporting period.

#### TRUSTEES RESPONSIBILITIES

Company and charity law requires the Trustees to prepare financial statements that give a true and fair view of the Trust at the end of the financial period and of its surplus or deficit for the financial period. In doing so, the Trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- Make judgments and estimates that are reasonable and prudent;
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- Follow the methods and principles of the Charity SORP; and
- Prepare the financial statements on the going concern basis unless it is inappropriate to assume that the Trust will continue in business.

The Trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Trust and to enable them to ensure that the financial statements comply with the Charities Act 2011, the applicable Charities (Accounts and Reports) Regulations, and the provisions of the Trust deed. They are also responsible for safeguarding the assets of the Trust and taking reasonable steps for the prevention and detection of fraud and other irregularities.

The Trustees are responsible for the maintenance and integrity of the Trust and financial information included on the Trust's website in accordance with legislation in the United Kingdom governing the preparation and dissemination of financial statements.

#### APPROVAL OF THE REPORT

This report was approved by the Board of Trustees on 05 July 2022 and signed on their behalf by:



Ruth McNeil, Chair of Trustees

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**MARGARET PYKE TRUST**  
(A Company Limited by Guarantee)

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**INDEPENDENT AUDITOR'S REPORT**  
**TO THE MEMBERS OF MARGARET PYKE TRUST**

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**Opinion**

We have audited the financial statements of Margaret Pyke Trust for the period ended 31 March 2022 which comprise Statement of Financial Activities (including the income and expenditure account), Balance sheet, Statement of cash flows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2022 and of its incoming resources and application of resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

**Basis for opinion**

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

**Conclusions relating to going concern**

In auditing the financial statements, we have concluded that the Trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charity's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the Trustees with respect to going concern are described in the relevant sections of this report.

**Other information**

The Trustees are responsible for the other information. The other information comprises the information included in the Trustees' Annual Report other than the financial statements and our

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**MARGARET PYKE TRUST**  
(A Company Limited by Guarantee)

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**INDEPENDENT AUDITOR'S REPORT**  
**TO THE MEMBERS OF MARGARET PYKE TRUST**

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auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

**Opinions on other matters prescribed by the Companies Act 2006**

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the Trustees' Annual Report, which includes the directors' report prepared for the purposes of company law, for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the directors' report included within the Trustees' Annual Report has been prepared in accordance with applicable legal requirements.

**Matters on which we are required to report by exception**

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees' Annual Report.

We have nothing to report in respect of the following matters in relation to which the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept, or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of Trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit; or
- the Trustees were not entitled to prepare the financial statements in accordance with the small companies regime and take advantage of the small companies' exemptions in preparing the Trustees' Annual Report and from the requirement to prepare a strategic report.

**Responsibilities of Trustees**

As explained more fully in the Trustees' responsibilities statement set out on page 20 the Trustees (who are also the directors of the charitable company for the purposes of company law) are



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**MARGARET PYKE TRUST**  
(A Company Limited by Guarantee)

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**INDEPENDENT AUDITOR'S REPORT**  
**TO THE MEMBERS OF MARGARET PYKE TRUST**

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responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the Trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

**Auditor's responsibilities for the audit of the financial statements**

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

- We obtained an understanding of the legal and regulatory frameworks that are applicable to the charitable company and determined that the most significant are the Statement of Recommended Practice 'Accounting and Reporting by Charities' (SORP 2015), in accordance with the Financial Reporting Standard applicable in the UK (FRS 102) applicable to smaller entities and the Companies Act 2006.
- We understood how the charitable company is complying with those frameworks via communication with those charged with governance, together with the review of the charity's documented policies and procedures.
- The audit team, which is experienced in the audit of charities, considered the charity's susceptibility to material misstatement and how fraud may occur. Our considerations included the risk of management override.
- Our approach was to check that the income from grants and donations were properly identified, expenditure were complied with the control procedures and appropriately charged. We also reviewed journal adjustments and unusual transactions.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: <https://www.frc.org.uk/auditorsresponsibilities>. This description forms part of our auditor's report.

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**MARGARET PYKE TRUST**  
(A Company Limited by Guarantee)


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**INDEPENDENT AUDITOR'S REPORT**  
**TO THE MEMBERS OF MARGARET PYKE TRUST**

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**Use of our report**

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

  
**Shoaib Arshad**  
**Senior Statutory Auditor**  
**For and on behalf of**

*5 July 2022*

**Knox Cropper LLP**  
**65 Leadenhall Street**  
**London EC3A 2AD**

# MARGARET PYKE TRUST

## STATEMENT OF FINANCIAL ACTIVITIES

(Incorporating Income and Expenditure Account & Statement of Total Realised Gains and Losses)  
For the period ended 31 March 2022

	Note	Unrestricted Funds 2022 £	Restricted Funds 2022 £	Total Funds 2022 £	Unrestricted Funds 2021 £	Restricted Funds 2021 £	Total Funds 2021 £
<b>INCOME FROM</b>							
Donations and legacies	2	142,618	331,996	474,614	78,465	194,453	272,918
Charitable activities:							
Training		107,805	-	107,805	54,337	-	54,337
International programmes		-	-	-	-	-	-
Investments	3	13,562	-	13,562	5,680	-	5,680
Other	2	19,310	-	19,310	4,963	-	4,963
<b>TOTAL INCOME</b>		<b>283,295</b>	<b>331,996</b>	<b>615,291</b>	<b>143,445</b>	<b>194,453</b>	<b>337,898</b>
<b>EXPENDITURE ON</b>							
Charitable activities:	4						
Training		126,194	-	126,194	76,247	-	76,247
Advocacy		76,582	99,306	175,888	45,059	94,167	139,226
International programmes		83,127	186,093	269,220	78,843	98,571	177,414
		285,903	285,399	571,302	200,149	192,738	392,887
Fundraising costs		18,308	-	18,308	24,724	-	24,724
<b>TOTAL EXPENDITURE</b>		<b>304,211</b>	<b>285,399</b>	<b>589,610</b>	<b>224,873</b>	<b>192,738</b>	<b>417,611</b>
<b>Net income/ (expenditure) and net movement in funds before gains and losses on investments</b>		<b>(20,916)</b>	<b>46,597</b>	<b>25,681</b>	<b>(81,428)</b>	<b>1,715</b>	<b>(79,713)</b>
Net gains / (losses) on investments	13	29,583	-	29,583	9,194	-	9,194
<b>NET MOVEMENT IN FUNDS</b>		<b>8,667</b>	<b>46,597</b>	<b>55,264</b>	<b>(72,234)</b>	<b>1,715</b>	<b>(70,519)</b>
<b>RECONCILIATION OF FUNDS</b>							
TOTAL FUNDS AT 1 MARCH 2021		369,312	40,128	409,440	441,546	38,413	479,959
<b>TOTAL FUNDS AT 31 MARCH 2022</b>		<b>377,979</b>	<b>86,725</b>	<b>464,704</b>	<b>369,312</b>	<b>40,128</b>	<b>409,440</b>

The annexed notes form part of these financial statements.

**BALANCE SHEET**

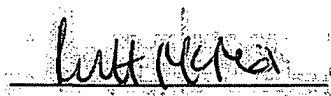
As at 31 March 2022

	Notes	£	2022 £	£	2021 £
<b>FIXED ASSETS</b>					
Tangible assets	12		1,022		1,558
Investments	13		360,454		392,637
			<u>361,476</u>		<u>394,195</u>
<b>CURRENT ASSETS</b>					
Prepayments and other debtors	14	34,938		16,748	
Investments	15	7,264		5,834	
Cash at bank and in hand		131,633		53,793	
			<u>173,835</u>	<u>76,375</u>	
<b>CREDITORS: amounts falling due within one year</b>	16	(70,607)		(61,130)	
<b>NET CURRENT ASSETS</b>			103,228		15,245
<b>NET ASSETS</b>			<u>464,704</u>		<u>409,440</u>
<b>FUNDS</b>					
Restricted funds	18		86,725		40,128
Unrestricted funds:					
General fund	18		377,979		369,312
			<u>464,704</u>		<u>409,440</u>

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) – (Charities SORP FRS 102), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

These accounts are prepared in accordance with special provisions of Part 15 of the Companies Act 2006.

They were approved, and authorised for issue, by the Board of Trustees on 05 July 2022 and signed on their behalf by:



Ruth McNeil, Chair of Trustees

The annexed notes form part of these financial statements.

**MARGARET PYKE TRUST****STATEMENT OF CASHFLOWS****For the period ended 31 March 2022**

	Note	2022	2021
		£	£
Cash flows from operating activities	17	3,941	(58,768)
Cash flows from investing activities			
Purchase of noncurrent assets		-	(1,520)
Dividends received from investments		13,562	5,680
Purchase of investments		(373,237)	(192,984)
Proceeds from sale of investments		435,005	217,955
		75,330	29,130
Cash flows from financing activities		-	-
Change in cash and cash equivalents in the year		79,271	(29,638)
Cash and cash equivalents at the beginning of the year		59,627	89,265
Cash and cash equivalents at the year end		138,898	59,627

# MARGARET PYKE TRUST

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## NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

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### 1. ACCOUNTING POLICIES

#### ***Basis of preparation of financial statements***

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant note(s) to these accounts. The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities, (SORP 2019), preparing their accounts in accordance with the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and the Charities Act 2011.

The presentational currency of the financial statements is Pound Sterling (£).

#### ***Public benefit entity***

The Trust meets the definition of a public benefit entity under FRS 102.

#### ***Going concern***

The Trustees consider that there are no material uncertainties about the Trust's ability to continue as a going concern.

Key judgements that the Trust has made which have a significant effect on the accounts include estimating income and expenditure for the next 12 months.

#### ***Income***

Income is recognised when the Trust has entitlement to the funds: this is when any performance conditions attached to the income have been met, it is probable that the income will be received, and that the amount can be measured reliably. Gifts in kind are recognised in the period in which the gift was received and measured on the basis of value to the Trust.

Income is only deferred when: The donor specifies that the grant or donation must only be used in future accounting periods; or for performance related grants, where these are received in advance of the performances or specific event to which they relate.

#### ***Interest receivable***

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the Trust; this is normally upon notification of the interest paid or payable by the bank.

#### ***Fund accounting***

Restricted funds are to be used for specific purposes as laid down by the donor. Expenditure which meets these criteria is charged to the fund.

Unrestricted funds are donations and other incoming resources received or generated for charitable purposes.

Designated funds are unrestricted funds earmarked by the Trustees for particular purposes.

#### ***Expenditure and irrecoverable VAT***

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required and the amount of the obligation can be measured reliably. All expenditure is classified under charitable activities.

# MARGARET PYKE TRUST

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## NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

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### ***Fundraising costs***

Costs of raising funds relate to the costs incurred by the Trust in inducing third parties to make voluntary contributions to it, as well as the cost of any activities with a fundraising purpose.

### ***Charitable activities***

Expenditure on charitable activities includes the costs of delivering services and reading activities undertaken to further the purposes of the Trust and their associated support costs.

### ***Other expenditure***

Other expenditure represents those items not falling into any other heading.

### ***Allocation of support costs***

Support and governance costs have been allocated between charitable activities and governance based on estimated staff costs. The allocation of support and governance costs is analysed in note 4.

### ***Tangible fixed assets and depreciation***

Tangible fixed assets (excluding investments) are stated at cost less depreciation. The cost of minor additions or those costing less than £400 are not capitalised. Other fixed assets with an expected life of more than one year or included at cost. Depreciation is provided at rates calculated to write off the cost less residual value of each asset over its expected useful life, as follows:

Equipment	–	25% straight line
Furniture	–	25% straight line

### ***Debtors***

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

### ***Investments***

Investments held as fixed assets are valued at mid-market value at the balance sheet date and the gain or loss taken to Statement of Financial Activities. Any realised gain or loss on sale or disposal of investment is taken to Statement of Financial Activities.

The investments are managed by independent professional fund managers for the purpose of capital appreciation and income generation by investing in medium risk equities and bonds.

### ***Cash at bank and in hand***

Cash at bank and cash in hand includes cash and short term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account. Cash balances exclude any funds held on behalf of service users.

### ***Creditors and provisions***

Creditors and provisions are recognised where the Trust has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

The Trust only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value with the exception of bank loans which are subsequently measured at amortised cost using the effective interest method.

## MARGARET PYKE TRUST

### NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

#### Foreign currencies

Transactions in foreign currencies are recorded at the rate ruling at the date of the transaction. Monetary assets and liabilities denominated in foreign currencies are translated at the rate of exchange ruling at the balance sheet date. All differences are taken to the Statement of Financial Activities.

#### Pensions

The Trust operates a defined contributions pension scheme, which is a Group Stakeholder Pension Scheme on a salary sacrifice basis. The Trust contributes 5% of gross pay for all staff. Pension costs are recognised in the Statement of Financial Activities at the percentage of gross pay. The fund manager's charges are factors into the unit value of the pension fund and are not recognised.

## 2. DONATIONS, GIFTS AND LEGACIES

	Unrestricted Funds 2022 £	Restricted Funds 2022 £	Total Funds 2022 £	Total Funds 2021 £
Grants, gifts and donations	136,880	331,996	468,876	258,139
Sponsorship	-	-	-	1,150
Gifts in kind	5,738	-	5,738	13,629
	<u>142,618</u>	<u>331,996</u>	<u>474,614</u>	<u>272,918</u>

Grants, gifts and donations comprise donations and grants received from various donors to carry out projects and other charitable activities. Gifts in kind represent Microsoft software and speaker fees (some specialist speakers supporting the Trust's UK training activities donated their time).

Other income received in the year £19,310 (2021 - £4,963) consists of HMRC JRS grant received for March 2021, contributions to UNFCCC COP26 event costs covered by external organisations, speaker fees on family planning and climate change.

## 3. INVESTMENT INCOME

	Unrestricted Funds 2021 £	Restricted Funds 2021 £	Total Funds 2021 £	Total Funds 2020 £
Interest receivable from:				
Income from UK listed investments	13,562	-	13,562	5,680
Bank interest receivable	-	-	-	-
	<u>13,562</u>	<u>-</u>	<u>13,562</u>	<u>5,680</u>



# MARGARET PYKE TRUST

## NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

### 4. ANALYSIS OF EXPENDITURE

	Staff/ consultant costs £	Direct costs £	Governance costs £	Support costs £	Total 2022 £	Total 2021 £
<b>2022</b>						
Charitable activities						
Training	62,092	52,335	3,994	7,773	126,194	76,247
Advocacy	119,682	27,942	9,593	18,671	175,888	139,226
International programmes	80,654	175,068	4,581	8,917	269,220	177,414
	<b>262,428</b>	<b>255,345</b>	<b>18,168</b>	<b>35,361</b>	<b>571,302</b>	<b>392,887</b>
Fundraising costs	15,531	239	861	1,677	18,308	24,724
Governance costs	13,611	5,418	(19,029)	–	–	–
Support costs	11,100	25,938	–	(37,038)	–	–
	<b>302,670</b>	<b>286,940</b>	<b>–</b>	<b>–</b>	<b>589,610</b>	<b>417,611</b>
<b>2021</b>						
Charitable activities						
Training	47,013	19,450	4,440	5,344	76,247	
Advocacy	98,025	26,141	6,834	8,226	139,226	
International programmes	70,752	93,800	5,837	7,025	177,414	
	215,790	139,391	17,111	20,595	392,887	
Fundraising costs	20,859	17	1,746	2,102	24,724	
Governance costs	14,177	4,680	(18,857)	–	–	
Support costs	11,879	10,818	–	(22,697)	–	
	<b>262,705</b>	<b>154,906</b>	<b>–</b>	<b>–</b>	<b>417,611</b>	

Of total expenditure of £589,610 (2021 – £417,611), £304,211 (2021 – £224,873) was incurred from unrestricted funds; and £285,399 (2021 – £192,738) was from restricted funds.

Total expenditure above includes the valuation of £5,738 gifts in kind received in the year (2021 – £13,629).

## MARGARET PYKE TRUST

### NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

#### 5. STAFF COSTS AND NUMBERS

	Unrestricted Funds 2022 £	Restricted Funds 2022 £	Total Funds 2022 £	Unrestricted Funds 2021 £	Restricted Funds 2021 £	Total Funds 2021 £
<b>Salary costs</b>						
Wages and salaries	144,179	103,485	247,664	118,259	98,108	216,367
Social security costs	17,819	–	17,819	15,459	–	15,459
Pension costs	37,156	–	37,156	30,835	–	30,835
	<u>199,154</u>	<u>103,485</u>	<u>302,639</u>	<u>164,553</u>	<u>98,108</u>	<u>262,661</u>
<b>Other staffing costs</b>						
Consultancy	-	-	-	-	5,360	5,360
Holiday pay	31	–	31	44	–	44
	<u>199,185</u>	<u>103,485</u>	<u>302,670</u>	<u>164,597</u>	<u>103,468</u>	<u>268,065</u>

The average weekly number of staff on a head count basis was 7 (2021 – 6). The average number of staff on a full-time equivalent basis was 6.2 (2021 – 5).

The total employee benefits of the key management personnel, including pension contributions but excluding Employer NI contributions, were £102,101 (2021 – £91,346).

During the year, there was one employee whose total employee benefits (excluding employer pension costs) fell within the reportable band of £80,000 - £90,000 (2021 – the same).

#### 6. TRUSTEES' REMUNERATION AND EXPENSES

No Trustees or other person related to any Trustee received any remuneration during the year nor had any personal interest in any contract or transaction entered into by the Trust during the year (2021 – Nil).

One ex-Trustee used to help to manage the operation of the Time Capsule Project funds held by the Trust as intermediary agent. During the year, £6,606 was returned to the ex-Trustee in relation to the Time Capsule Project (2021 – £275), so as at 31 March 2022 the Trust does not hold any third-party funds.

#### 7. OTHER RELATED PARTIES

The Trustees have not identified any other reportable related parties or related party transactions.

## MARGARET PYKE TRUST

### NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

#### 8. TAXATION

The Trust is exempt from corporation tax on its charitable activities under Sections 466 to 493 of the Corporation Tax Act 2010 (CTA2010).

#### 9. SUPPORT COSTS

	<b>Total Funds</b>	<i>Total Funds</i>
	<b>2022</b>	<i>2021</i>
	<b>£</b>	<i>£</i>
Recruitment	<b>6,728</b>	–
Staff training and development	–	–
Advertising and promotion	–	–
Rent and room hire	<b>2,340</b>	2,160
Other premises costs	–	–
Communications (website, phone, internet, etc)	<b>2,187</b>	1,663
Stationery and postage	<b>58</b>	166
Design and printing	<b>178</b>	–
Insurance	<b>853</b>	950
IT maintenance & support	<b>2,151</b>	2,363
Travel and subsistence	<b>1,487</b>	168
Accountancy fees	–	1,104
Legal & other professional fees	<b>126</b>	58
Bank charges	<b>98</b>	16
Subscriptions	<b>173</b>	162
General administrative costs	<b>1,176</b>	154
Sundries	–	500
Depreciation	<b>536</b>	356
Foreign currency gains / (losses)	<b>(3,770)</b>	(7,217)
Investment manager's fees	<b>5,528</b>	7,912
Direct fundraising costs	–	–
Computer Costs	<b>6,089</b>	303
Conference fees	–	–
	<b>25,938</b>	<i>10,818</i>
Staff support costs	<b>11,100</b>	<i>26,056</i>
	<b>37,038</b>	<i>36,874</i>

Support costs have been allocated to charitable activities on the basis of staff time.

# MARGARET PYKE TRUST

## NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

### 10. GOVERNANCE COSTS

	Unrestricted Funds 2022 £	Restricted Funds 2022 £	Total Funds 2022 £	Total Funds 2021 £
Audit fees: annual financial statement	5,418	–	5,418	4,680
Governance staff costs	13,611	–	13,611	14,177
	<u>19,029</u>	<u>–</u>	<u>19,029</u>	<u>18,857</u>

Governance costs have been allocated to charitable activities on the basis of staff time.

### 11. NET INCOME / (EXPENDITURE) FOR THE YEAR

	2022 £	2021 £
<b>Net income/(expenditure) is stated after charging:</b>		
Staff pension contributions	24,556	30,835
Depreciation and other amounts written off fixed assets	536	356
Auditors Remuneration: audit fees	5,418	4,680
Other fees payable to auditors: grant audit	–	–
Exchange (gains)/losses	<u>(3,770)</u>	<u>(7,217)</u>

### 12. TANGIBLE FIXED ASSETS

	Office equipment £	Fixtures and fittings £	Total £	2021 Total £
<b>Cost</b>				
At 1 March 2021	6,150	5,333	11,483	9,963
Additions	–	–	–	1,520
At 31 March 2022	<u>6,150</u>	<u>5,333</u>	<u>11,483</u>	<u>11,483</u>
<b>Depreciation</b>				
At 1 March 2021	4,592	5,333	9,925	9,569
Charge for the year	536	–	536	356
At 31 March 2022	<u>5,128</u>	<u>5,333</u>	<u>10,461</u>	<u>9,925</u>
<b>Net book value</b>				
At 28 February 2021	<u>1,558</u>	<u>–</u>	<u>1,558</u>	<u>394</u>
At 31 March 2022	<u>1,022</u>	<u>–</u>	<u>1,022</u>	<u>1,558</u>

# MARGARET PYKE TRUST

## NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

### 13. FIXED ASSETS INVESTMENTS

	2022 £	2021 £
Assets held primarily to provide an investment return are analysed as follows:		
UK listed investments		
Bonds and Bond funds	-	94,601
Shares, Traditional Funds and Options	-	298,036
Charity responsible multi-asset fund	360,454	-
	<u>360,454</u>	<u>392,637</u>
<b>Market value</b>		
At the beginning of the year	392,639	408,415
Additions	373,237	192,984
Realised gains / (losses) on investments	8,539	(61,617)
Unrealised gains / (losses) on investments	21,044	70,810
Disposals	(435,005)	(217,955)
<b>At the end of the year</b>	<u>360,454</u>	<u>392,637</u>

### 14. DEBTORS

	2022 £	2021 £
<b>Due within one year</b>		
Trade debtors	1,840	1,320
Prepayments and other debtors	3,561	12,924
Accrued income	29,537	2,504
	<u>34,938</u>	<u>16,748</u>

### 15. INVESTMENTS HELD AS CURRENT ASSETS

	2022 £	2021 £
<b>Cash equivalents on deposit</b>		
Mirabaud client account (GBP)	-	5,717
Mirabaud client account (Euro)	-	117
Mirabaud client account (USD)	-	-
Cazenove client account (GBP)	7,264	-
	<u>7,264</u>	<u>5,834</u>

## MARGARET PYKE TRUST

### NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

#### 16. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2022 £	2021 £
Trade creditors	-	1,050
Other creditors	-	7,993
Accruals	50,204	23,622
Deferred income	12,640	17,695
Taxation and social security	6,950	3,382
Custodian funds held	-	6,606
Holiday pay accrual	813	782
	<b>70,607</b>	<b>61,130</b>
<u>Deferred income</u>		
Balance at 1 March 2021	17,695	4,447
Amount released to incoming resources	(17,695)	(4,447)
Amount deferred in the year	12,640	17,695
	<b>12,640</b>	<b>17,695</b>
Balance at 31 March 2022	<b>12,640</b>	<b>17,695</b>

Deferred income at the end of the current year of £12,640 relates to training courses delivered during 2022 but invoiced and/or paid for before the end of the financial year (2021 – £17,695).

#### 17. RECONCILIATION OF NET MOVEMENT IN FUNDS TO NET CASH FLOW FROM OPERATING ACTIVITIES

	2022 £	2021 £
Net movement in funds	55,264	(70,519)
Add back (deduct) investment losses / (gains)	(29,583)	(9,194)
Add back depreciation	536	356
Deduct interest income shown in investments	(13,562)	(5,680)
Decrease / (increase) in debtors	(18,191)	23,316
Increase / (decrease) in creditors	9,477	2,952
	<b>3,941</b>	<b>(58,769)</b>
Net cash used in operating activities	<b>3,941</b>	<b>(58,769)</b>

## MARGARET PYKE TRUST

### NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

#### 18. STATEMENT OF FUNDS

	Brought forward £	Incoming Resources £	Resources Expended £	Transfers and Investment gains/(losse s) £	Carried Forward £
<b>RESTRICTED FUNDS</b>					
Advocacy	5,675	145,707	(99,305)	–	52,077
International programmes	34,453	186,289	(186,094)	–	34,648
	<u>40,128</u>	<u>331,996</u>	<u>(285,399)</u>	<u>--</u>	<u>86,725</u>

#### Purpose of restricted funds

##### Advocacy

Grants received are restricted to the costs of the Trust's advocacy work. The balance of remaining funds is £52,077 and will be spent in the following year.

##### International programmes

Grants received are restricted to the costs of the Trust's international programmes. The balance of remaining funds is £34,648 and will be spent in the following year.

# MARGARET PYKE TRUST

## NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

### SUMMARY OF FUNDS

2022

	Brought forward £	Incoming Resources £	Resources Expended £	Transfers and Investment gains/(losses) £	Carried Forward £
General Funds	369,312	283,295	(304,211)	29,583	377,979
Restricted Funds	40,128	331,996	(285,399)	-	86,725
	<b>409,440</b>	<b>615,291</b>	<b>(589,610)</b>	<b>29,583</b>	<b>464,704</b>

2021

	Brought forward £	Incoming Resources £	Resources Expended £	Transfers and Investment gains/(losses) £	Carried Forward £
<b>RESTRICTED FUNDS</b>					
Advocacy	19,033	80,809	(94,167)	-	5,675
International programmes	19,380	113,644	(98,571)	-	34,453
<b>UNRESTRICTED FUNDS</b>					
General funds	441,546	143,445	(224,873)	9,194	369,312
	<b>479,959</b>	<b>337,898</b>	<b>(417,611)</b>	<b>9,194</b>	<b>409,440</b>



# MARGARET PYKE TRUST

## NOTES TO THE FINANCIAL STATEMENTS

For the period ended 31 March 2022

### 19. ANALYSIS OF NET ASSETS BETWEEN FUNDS

2022

	Unrestricted funds		Restricted Funds	Total Funds
	Designated Funds	General Funds		
	£	£	£	£
Tangible fixed assets	–	1,022	–	1,022
Fixed asset investments	–	360,454	–	360,454
Net current assets	–	16,503	86,725	103,228
	<u>–</u>	<u>377,979</u>	<u>86,725</u>	<u>464,704</u>

2021

<i>Tangible fixed assets</i>	–	1,558	–	1,558
<i>Fixed Asset investments</i>	–	392,637	–	392,637
<i>Net current assets</i>	–	(24,883)	40,128	15,245
	<u>–</u>	<u>369,312</u>	<u>40,128</u>	<u>409,440</u>

### 20. ANALYSIS OF THE NET MOVEMENT IN FUNDS

	Unrestricted Funds	Restricted Funds	Total Funds	Total Funds
	2022	2022	2022	2021
	£	£	£	£
Net movement in funds	8,667	46,597	55,264	(70,519)
	<u>8,667</u>	<u>46,597</u>	<u>55,264</u>	<u>(70,519)</u>

## **MARGARET PYKE TRUST**

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### **NOTES TO THE FINANCIAL STATEMENTS**

**For the period ended 31 March 2022**

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#### **21. COMPANY LIMITED BY GUARANTEE**

The Trust is a company limited by guarantee and accordingly does not have a share capital.

Every Trustee is a Member of the charitable company and, in their capacity as a Member, undertakes to contribute such amount as may be required not exceeding £10 to the assets of the charitable company in the event of its being wound up while she or he is a member, or within one year after she or he ceases to be a Trustee.

#### **22. FUND HELD AS INTERMEDIARY AGENT**

At the start of the year, the Trust held £6,606 on behalf of the Time Capsule Project, which is administered by one of the ex-Trustees, who is the project custodian. During the year £6,606 was returned back to the custodian, so at 31 March 2022 the Trust does not hold any third-party funds.