

APPENDIX 1

OSCR

Scottish Charity Regulator

Office of the Scottish Charity Regulator

Trustees' Annual Report for the period							
	Period start date				Period end date		
	Day	Month	Year		Day	Month	Year
From	01	07	25	To	30	06	26

Reference and administration details

Charity name	ROTARY CLUB OF CURRIE BALERNO TRUST FUND		
Other names charity is known by			
Registered charity number	SC 027718		
Charity's principal address	2 THE GREEN		
	BALERNO		
	MIDLOTHIAN		
	Postcode		EH14 7LD

Names of the charity trustees on date of approval of Trustees' Annual Report

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	PETER KEW	PRESIDENT		
2	KEN McCUNN	PAST PRESIDENT		
3	THERESA DOUGLAS	SECRETARY		
4	DOUGLAS MARR	TREASURER		
5	DON MACLEOD	FOUNDATION		
6	COLIN ASPINAL	MEMBERSHIP		
7	BRIAN SMITH	PROGRAMME		
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Reference and administration details

Names of all other charity trustees during the period, if any, (for example, those who resigned part way through the financial period)

Name	Dates acted if not for whole year
PERCY FARREN	
MIKE ROWE	

Structure, governance and management

Type of governing document	TRUST DEED
Trustee recruitment and appointment	CLUB MEMBERS ELECT OFFICE BEARERS ANNUALLY. PRESIDENT, PRESIDENT ELECT, SECRETARY, TREASURER AND CHAIRS OF FOUNDATION, PROGRAMME AND MEMBERSHIP. ALONG WITH THE IMMEDIATE PAST PRESIDENT. THEY ARE ALSO APPOINTED AS TRUSTEES

Objectives and activities

Charitable purposes	OUR CHARITY FOLLOWS THE 7 AREAS OF FOCUS FOR ROTARY, PRIORITISED BY NEED. 1. PROMOTING PEACE 2. FIGHTING DISEASE 3. PROVIDING CLEAN WATER 4. SAVING MOTHERS AND CHILDREN 5. SUPPORTING EDUCATION 6. GROWING LOCAL ECONOMIES 7. PROTECTING THE ENVIRONMENT
Summary of the main activities in relation to these objects	MEMBERS ACTIVITIES - 3 MAIN AREAS. ACTIVE SUPPORT, PERSONAL DONATIONS AND FUNDRAISING E.G. COOKING AT FOOD BANKS, TREE PLANTING AND MAINTENANCE, WORKING WITH SCHOOLS ON INITIATIVES SUCH AS LEND WITH CARE and YOUNG MUSICIAN FUNDRAISING INCLUDES TREE OF LIFE, GIFT WRAPPING AND MAKING WOODEN SNOWMEN TO SELL

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Achievements and performance

Summary of the main achievements of the charity during the financial period

ACCELERATION OF WORKING IN PARTNERSHIP WITH OUR LOCAL COMMUNITY BY

1. RECRUITING BUSINESS'S AS COMMUNITY MEMBERS TO HELP PRIORITISE AND IMPLEMENT AREAS TO FOCUS ON LOCALLY.
2. WORKING IN PARTNERSHIP WITH BALERNO VILLAGE TRUST TO SUPPORT LOCAL ORGANISATIONS THROUGH GRANTS
3. SUPPORTING OUR LOCAL FOOD BANKS DEVELOP NEW INITIATIVES E.G. HELPING COOK MEALS FOR USERS OF TRINITY CHURCH WESTER HAILES AND HEALTHY FOOD FOR CHILDREN
4. WORKING WITH DODDIES WEIR'S FOUNDATION BY RAISING MONEY FOR RESEARCH
- 5 WORKING WITH PENTLANDS ECO NETWORK IN THE DEVELOPMENT AND MAINTENANCE OF THE LOCAL ORCHARD CREATED IN KING GEORGE V PARK
6. PROVIDING YOUTH GRANTS SUPPORTING BOTH GROUP AND INDIVIDUAL EDUCATION NEEDS
7. CONTINUING TO HELP OUR LOCAL DISPLACED UKRAINIANS MAINTAIN COMMUNITY INVOLVEMENT
8. ACHIEVING OUR LOCAL TARGETS TO SUPPORT THE FIGHT TO END POLIO NOW AND THE ROTARY FOUNDATION (TRF) TRF WORKS WORLDWIDE MAKING A DIFFERENCE IN ALL AREAS OF OUR CLUB'S CHARITABLE PURPOSES.

Financial review

Brief statement of the charity's policy on reserves

SINCE COVID WE HAVE DOUBLED THE FUNDS WE CARRY FORWARD EACH YEAR. THIS IS DUE TO THE INCREASED COST OF LIVING AND LESS CASH IN CIRCULATION WHICH AFFECTS FUNDRAISING OUR ROTARY YEAR ENDS IN JUNE AND OUR MAIN FUNDRAISING IS AT CHRISTMAS. THE HIGHER RESERVES FACILITATES US HELPING OTHERS BETWEEN JULY AND DECEMBER

Details of any deficit

NIL

Donated facilities and services (if any)

NIL

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Other optional information

Declaration

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

Signed on behalf of the charity’s trustees

Signature(s) <i>OSCR will accept digital or typed signatures</i>	PETER KEW	DOUGLAS MARR
Full name(s)	PETER KEW	DOUGLAS MARR
Position (e.g. Chair)	PRESIDENT	TREASURER
Date	03/08/2026	03/08/2026