

APPENDIX 1



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	04	2024	To	31	03	2025

Reference and administration details

Charity name	Healthiest Town Aberfeldy
Other names charity is known by	
Registered charity number	SC053650
Charity's principal address	c/o Locus Centre
	The Square
	Aberfeldy
	Postcode PH15 2DD

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		Co-chair		
2		Co-chair		
3		secretary		
4		treasurer		
5			From 13 Jan 2025	
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

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

Structure, governance and management

Type of governing document

Scottish Charitable Incorporated Organisation (SCIO)

Trustee recruitment and appointment

The Trustees comprise those listed at page 1 and in accordance with Clause 17 of the Constitution are deemed to have been appointed by the members with effect from the date of incorporation of the organisation. As a new trustee [REDACTED] was appointed by the existing trustees in accordance with Clause 18 of the Constitution.

Objectives and activities

Charitable purposes

The association shall have the following purposes for the Aberfeldy population*:

- i) To enable individuals to take responsibility for their own health and well-being
- ii) To remove as many barriers to good health as possible
- iii) To decrease the levels of preventable diseases
- iv) To improve mental health and well-being
- As defined by the population registered with the Aberfeldy & Kinloch Rannoch medical centre

Summary of the main activities in relation to these objects

Healthiest Town Aberfeldy acts as both influencer (to its population) and in the delivery of a range of projects based on four evidence-led 'pillars' which have been shown to promote longer and healthier lives:

- i) Eat real
- ii) Move every day
- iii) Connect with others
- iv) Build mental well-being (Find Balance)

APPENDIX 1

Achievements and performance

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

1. Move more
 - Physical Activity linkworker employed to 31/3/25
 - Winter Boost programme: a range of events, talks and workshops to encourage people to come together and try out new activities (such as pickleball, Zumba and carpet bowls)
 - Ceilidhs (April 2024 and March 2025)
 - Santa Run: a 'fun run' over a range of distances
 - Engagement with three local primary schools to promote interest in physical activity
 - Weekly Walk/Talk/Walk and Run/Talk/Run
2. Eat Real
 - Established Highland Perthshire food network
 - Active participant in PKC Food Network
 - Open Gate festival: a 9 day long festival of talks, workshops and open productive gardens to promote dialogue around growing more food locally and encourage interest in foraging, cooking and regenerative agriculture
 - Too Good to Waste campaign to encourage local businesses and consumers to make best use of leftover food
 - Aberfeldy Manifesto: relaunch of 50 year old local manifesto to encourage more local production of food and greater awareness of soil health and climate change
 - Bioregioning Tayside / Tayside Charter: working across a wider area to develop and promote food security
 - Let's get growing: a local programme of events, talks and practical support to encourage more of our community to grow some of their own food and/or volunteer in community / market gardens locally
 - Engagement with three local primary schools to promote interest in growing and in healthier eating
3. Connect with others
 - All our activities promote participation and encourage connection with others in our community

4. Find Balance

- We encourage, through our influencing networks and our range of events, participation in activities that lead to an appreciation of nature and the beauty of our local countryside
- Workshops and events to build resilience: yoga, breathwork; etc

In support, we have:

- Recruited a self-employed communications lead to promote our activities and influencing role
- Continued to employ a self-employed manager to raise funds and oversee/organise the various activities throughout the year.

Financial review

Brief statement of the charity's policy on reserves

- Healthiest Town Aberfeldy will retain a balance of three months' wages for all contractors / paid staff plus 10% of other costs.
- The Treasurer will notify Trustees if this level is breached

Details of any deficit

None

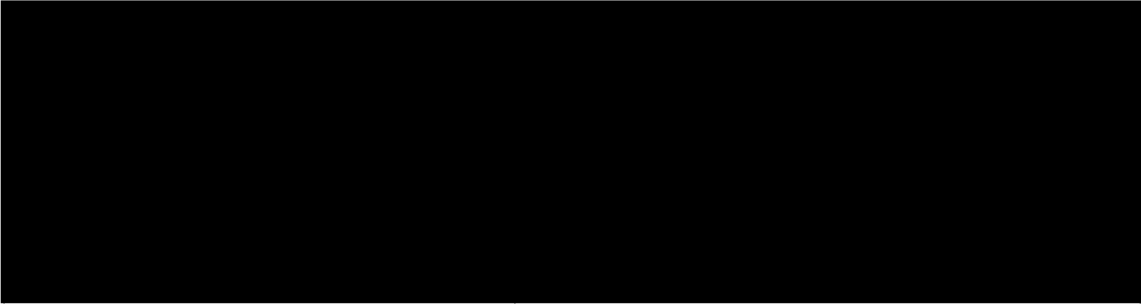
Donated facilities and services (if any)

N/a

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>		
Full name(s)		
Position (e.g. Chair)	Chair	Treasurer
Date	24/12/2025	22/12/25

Healthiest Town Aberfeldy

SCO36560



Receipts and payments accounts							
For the period from	Period start date			to	Period end date		
	Day	Month	Year		Day	Month	Year
	17	Septembe	2024		31	March	2025

Section A Statement of receipts and payments

	Unrestricted funds	Restricted funds	Expendable endowment funds	Permanent endowment funds	Total funds current period	Total funds last period
	to nearest £	to nearest £	to nearest £	to nearest £	to nearest £	to nearest £
A1 Receipts						
Donations					-	3,418
Legacies					-	
Grants	10,000	18,625			28,625	4,938
Receipts from fundraising activities					-	
Gross trading receipts					-	
Income from investments other than land and buildings					-	
Rents from land & buildings					-	
Gross receipts from other charitable activities	637				637	
					-	
A1 Sub total	10,637	18,625	-	-	29,262	8,356
A2 Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
A2 Sub total	-	-	-	-	-	-
Total receipts	10,637	18,625	-	-	29,262	8,356
A3 Payments						
Expenses for fundraising activities					-	
Gross trading payments					-	
Investment management costs					-	
Payments relating directly to charitable activities	3,111	13,542			16,653	
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
Other	1,139				1,139	
					-	
A3 Sub total	4,250	13,542	-	-	17,792	-
A4 Payments relating to asset and investment movements						
Purchases of fixed assets					-	
Purchase of investments					-	
A4 Sub total	-	-	-	-	-	-
Total payments	4,250	13,542	-	-	17,792	-
Net receipts / (payments)	6,387	5,083	-	-	11,470	8,356
A5 Transfers to / (from) funds						
					-	
Surplus / (deficit) for year	6,387	5,083	-	-	11,470	8,356

Section B Statement of balances

Categories	Details	Unrestricted funds	Restricted funds	Expendable endowment funds	Permanent endowment funds	Total current period	Total last period
		to nearest £	to nearest £	to nearest £	to nearest £	to nearest £	to nearest £
B1 Cash funds	Cash and bank balances at start of year	3,418	4,938			8,356	
	Surplus / (deficit) shown on receipts and payments account	6,387	5,083			11,470	8,356
						-	
						-	
	Cash and bank balances at end of year	9,805	10,021	-	-	19,826	8,356
	(Agree balances with receipts and payments account(s))	-	-	-	-	-	-

B2 Investments	Details	Fund to which asset belongs	Market valuation	Last year
			to nearest £	to nearest £
		Total	-	-

B3 Other assets	Details	Fund to which asset belongs	Cost (if available)	Current value (if available)	Last year
			to nearest £	to nearest £	to nearest £
		Total	-	-	-

B4 Liabilities	Details	Fund to which liability relates	Amount due	Last year
			to nearest £	to nearest £
		Total	-	-

B5 Contingent liabilities	Details	Fund to which liability relates	Amount due (estimate)	Last year
			to nearest £	to nearest £
		Total	-	-

Signed by one or two trustees on behalf of all the trustees

Signature*

Print Name

Date of approval

	12/15/2025
	12/24/2025

Section C Notes to the Accounts

C1 Nature and purpose of funds (may be stated on analysis of funds worksheets)

Unrestricted funds are those that may be used at the discretion of the trustees in furtherance of the objects of the charity. Restricted funds may only be used for specific purposes. Restrictions arise when specified by the donor or when funds are raised for specific purposes.

	Type of activity or project supported	Individual / institution	Number of grants made	£
C2 Grants	Paths for all	SCSP	1	5,625
	Food for people and planet - Community Investment Fund	Perth & Kinross Council	1	2,000
	Winter Boost programme	Anderson Strath CL Basil Death Trust	1	1,500
	Tayside Manifesto and Hyper Local Food Plan	BioRegioning Tayside	2	9,500
	Unrestricted support for Healthiest Town Aberfeldy programme and charitable objectives	Tayside Health NHS	1	10,000
		Total		28,625

C3a Trustee remuneration

If no remuneration was paid during the period to any charity trustee or person connected to a trustee cross this box (otherwise complete section 3b)	
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C3b Trustee remuneration - details

Authority under which paid	£
Person connected to a trustee (wife) received remuneration for project management	

C4a Trustee expenses

If no expenses were paid to any charity trustee during the period then cross this box (otherwise complete section 4b)	x
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C4b Trustee expenses - details

	Number of trustees	£

C5 Transactions with trustees and connected persons

Nature of relationship	Nature of transaction	Transaction amount (£)	Balance outstanding at period end (£)
Wife of trustee	Project Manager	6,747	0



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C6 Other information

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Healthiest Town Aberfeldy

SCO36560

Additional analysis (1)

Analysis of receipts and payments

1 Donations

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
Opening balance - charity status					-	3,418
					-	
					-	
					-	
Total	-	-	-	-	-	3,418

2 Grants

	Unrestricted funds to nearest £	Restricted funds to nearest £	Total current period to nearest £	Total last period to nearest £
Paths for all inc opening balance		5,625	5,625	4,938
Perth & Kinross CNCL		2,000	2,000	
Anderson Strath CL Basil Death Trust		1,500	1,500	
BioRegioning Tayside		9,500	9,500	
Tayside Health NHS	10,000		10,000	
Total	10,000	18,625	28,625	4,938

3 Gross receipts from other charitable activities

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
Eventbrite	501				501	
Open Gate	25				25	
Santa run	81				81	
	30				30	
					-	
					-	
					-	
Total	637	-	-	-	637	-

4 Payments relating directly to charitable activities

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
Banner and Print Media	73	228			301	
Catering	102	18			120	
Clothing	55				55	
Comms	564	2,924			3,488	
Consultants		200			200	
Hire	50	1,090			1,140	
Mobile	42				42	
Physical Activity Linkworker		4,332			4,332	
Project Manager	1,940	4,130			6,070	
Workshop	285	620			905	
					-	
Total	3,111	13,542	-	-	16,653	-

Additional analysis (2)

5 Breakdown of unrestricted funds

	Unrestricted fund 1 - enter name of fund below	Unrestricted fund 2 - enter name of fund below	Unrestricted fund 3 - enter name of fund below	Unrestricted fund 4 - enter name of fund below	Total unrestricted funds	Total unrestricted funds last period
	Tayside Health NHS	Eventbrite	Other various smallscale unrestricted funds			
Receipts						
Donations					-	3,417
Legacies					-	
Grants	10,000				10,000	
Receipts from fundraising activities					-	
Gross trading receipts					-	
Income from investments other than land and buildings					-	
Rents from land & buildings					-	
Gross receipts from other charitable activities		501			501	
Open Gate			25		25	
Santa run			81		81	
Ceilidh			30		30	
Sub total	10,000	501	136	-	10,637	3,417
Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
Sub total	-	-	-	-	-	-
Total receipts	10,000	501	136	-	10,637	3,417
Payments						
Expenses for fundraising activities					-	
Gross trading payments					-	
Investment management costs					-	
Payments relating directly to charitable activities	1,460	296	1,355		3,111	
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
Other	365		774		1,139	
Sub total	1,825	296	2,129	-	4,250	-
Payments relating to asset and investment movements						
Purchases of fixed assets					-	
Purchase of investments					-	
Sub total	-	-	-	-	-	-
Total payments	1,825	296	2,129	-	4,250	-
Net receipts / (payments)	8,175	205	(1,993)	-	6,387	3,417
Transfers to / (from) funds						
Surplus / (deficit) for year	8,175	205	(1,993)	-	6,387	3,417

Nature and purpose of funds

The total unrestricted funds last period (£3,417) has been treated as a donation under Other various smallscale unrestricted funds leaving a balance of £1,424. In order to balance the spreadsheet this could not been shown as a transfer.

Healthiest Town Aberfeldy

SCO36560

Additional analysis (3)**6 Breakdown of restricted funds**

	Restricted fund 1 - enter name of fund below	Restricted fund 2 - enter name of fund below	Restricted fund 3 - enter name of fund below	Restricted fund 4 - enter name of fund below	Total restricted funds	Total restricted funds last period
	Paths for All	Perth & Kinross CNCL	Anderson Starth CL Basil Death Trust	BioRegioning Tayside		
Receipts						
Donations					-	
Legacies					-	
Grants	5,625	2,000	1,500	9,500	18,625	4,938
Receipts from fundraising activities					-	
Gross trading receipts					-	
Income from investments other than land and buildings					-	
Rents from land & buildings					-	
Gross receipts from other charitable activities					-	
Sub total	5,625	2,000	1,500	9,500	18,625	4,938
Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
Sub total	-	-	-	-	-	-
Total receipts	5,625	2,000	1,500	9,500	18,625	4,938
Payments						
Expenses for fundraising activities					-	
Gross trading payments					-	
Investment management costs					-	
Payments relating directly to charitable activities	8,769	1,964	1,267	1,542	13,542	
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
Sub total	8,769	1,964	1,267	1,542	13,542	-
Payments relating to asset and investment movements						
Purchases of fixed assets					-	
Purchase of investments					-	
Sub total	-	-	-	-	-	-
Total payments	8,769	1,964	1,267	1,542	13,542	-
Net receipts / (payments)	(3,144)	36	233	7,958	5,083	4,938
Transfers to / (from) funds					-	
Surplus / (deficit) for year	(3,144)	36	233	7,958	5,083	4,938
Nature and purpose of funds						
A balance of restricted funds received for Paths for all last period (£4,938) has been added to the relevant column leaving a balance of £1,794. In order to balance the spreadsheet this could not be shown as a transfer.						

APPENDIX 3



Report to the trustees/members of
Registered charity number
On the accounts of the charity for the period
Set out on pages

Independent examiner's report on the accounts v2						
Healthiest Town Aberfeldy						
SC053650						
Period start date				Period end date		
Day	Month	Year	to	Day	Month	Year
17	SEP	2024		31	MAR	2025
One and two of this appendix 3						(remember to include the page numbers of additional sheets)

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts in accordance with the terms of the Charities and Trustee Investment (Scotland) 2005 Act and the Charities Accounts (Scotland) Regulations 2006 (as amended). The charity trustees consider that the audit requirement of Regulation 10(1) (d) of the Accounts Regulations does not apply. It is my responsibility to examine the accounts as required under section 44(1) (c) of the Act and to state whether particular matters have come to my attention.

Basis of independent examiner's statement

My examination is carried out in accordance with Regulation 11 of the 2006 Accounts Regulations. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts and seeks explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, I do not express an audit opinion on the view given by the accounts.

Independent examiner's statement

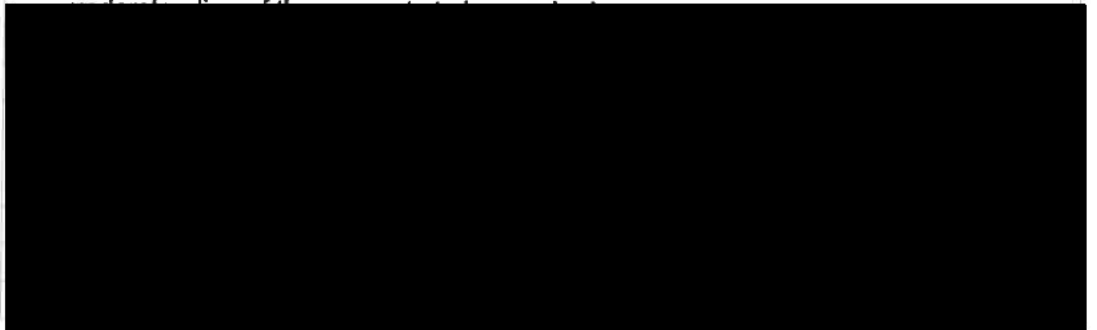
In the course of my examination, no matter has come to my attention [~~other than that disclosed on the attached page*~~]

1. which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with section 44(1) (a) of the 2005 Act and Regulation 4 of the 2006 Accounts Regulations, and
 - to prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 Accounts Regulations

have not been met, or

2. to which, in my opinion, attention should be drawn in order to enable a proper

Signed:
Name:
Relevant professional qualification(s) or body (if any):
Address:



*Please delete the words in the brackets if they do not apply. If the words do apply, set out those matters which have come to your attention on the following page.

APPENDIX 3

Disclosure section

Only complete if the examiner needs to highlight material problems.

Give here brief details of any items that the examiner wishes to disclose