

ROTARY CLUB OF CUCKFIELD AND LINDFIELD TRUST FUND

England & Wales · Charity number 1032500

Details

Status Registered

Legal form Trust

Registered 1994-02-10

Register [View on the Charity Commission register](#)

Contact

Address 19 Brook Lane
Lindfield
Haywards Heath
RH16 1SF

Phone 01444414456

Email gdew@talktalk.net

Website www.rotarysussex.org

Activities

Objects: THE RELIEF OF THE POOR AND NEEDY OR TO OR FOR SUCH OTHER CHARITABLE PURPOSE, INSTITUTION, SOCIETY OR OBJECT.

Activities: As a member of Rotary International our aim is to help those in need through donations and community support. The Trust Fund raises money through fund raising events and members personal donations.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Provides Human Resources, Provides Advocacy/advice/information
- **What:** General Charitable Purposes
- **Who:** Children/young People, Elderly/old People, People With Disabilities, Other Charities Or Voluntary Bodies, The General Public/mankind

Geography

- West Sussex

Finances

Period end	Income	Expenditure	Assets	Employees
2025-06-30	£23,448	£18,239	-	-
2024-06-30	£33,343	£32,205	-	-
2023-06-30	£28,025	£31,005	-	-
2022-06-30	£29,068	£6,093	-	-
2021-06-30	£23,677	£25,191	-	-

Trustees

Name	Role	Appointed
Andy Harrison	Chair	2019-07-01
DR GEOFFREY CLIFFORD RODERICK DEW		2014-07-01
DR Judith Ann Pratt		2018-07-01

Accounts

Rotary Club of Cuckfield & Lindfield Charitable Trust Fund

Registered Charity No. 1032500

Trustees' Annual Report for the year ended 30 June 2024

The Trustees are pleased to present the Annual Report of the Rotary Club of Cuckfield & Lindfield Charitable Trust Fund ("Charitable Trust") for the year ended 30 June 2024.

Reference and Administration

Trustees

The following trustees served throughout the Rotary year 1st July 2023 to 30th June 2024

Professor Judith Pratt	Chairman
Andy Harrison	Secretary
Geoffrey Dew	Treasurer
Jaime Wallden	Trustee
Richard Hirst	Club president elect

Structure Governance and Management

Constitution

The Charitable Trust is constituted under a Trust Deed dated 18 January 1994. The Charitable Trust does not have a principal office nor does it have any employees. The Trustees are appointed annually by the members of the Club and are the serving officers on the Council of the Club for that year and other members of the club. The members of the Club volunteer their services to the Charitable Trust without payment. The Trustees have delegated to the Club's Council and members the responsibility of identifying suitable and worthy causes to support within the Charitable Trust's objectives and to manage the distribution of funds raised from events they have organised. The actions taken by the Club on behalf of the Charitable Trust are reviewed and approved by the Trustees.

Objectives

The principal objective of the Charitable Trust is to help those in need through donations and community service. Money is raised from fund raising events and personal donations from club members and the general public. All monies received are distributed to worthy causes that are considered by the Trustees to be for the public benefit. The Charitable Trust does not incur any administrative costs.

The Club is a member of Rotary International and participates with other Rotary Clubs in the UK and overseas in charitable fund-raising events.

Activities Undertaken for the Public Benefit

Annually the Trustees consider the governance and accounting procedures of the club and the need to meet the public benefit requirements. The Trustees confirm that they have paid due regard to the guidance issued by the Charity Commission on public benefit requirements when approving actions taken by the Club in distributing funds raised during the course of the year.

Achievements and Performance and Financial Review

The club organised several fund-raising events during the year. Monies were also raised from members, general donations and public collections. The total funds raised in the year amounted to net receipts of £33,343. Details of these events are shown in the attached accounts.

The Charitable Trust made donations from its own resources of £32,205. The beneficiaries comprised local hospices, schools and community support groups as well as international aid projects organised by the Rotary worldwide organisation and by the Trust. Details of the principal donations are shown in the attached accounts.

Policy on Reserves

The general aim of the Charitable Trust is not to hold reserves for the longer term, but to distribute during the year or shortly thereafter all funds raised. Accordingly at 30 June 2024 the Charitable Trust had a cash balance of £15,324 in the bank with plans to distribute the majority of these funds during 3Q 2024 leaving a contingency of uncommitted funds of about £5,000. The Charitable Trust does not have any other assets or restricted funds.

Serious incidents

The Trustees confirm that there have been no serious incidents or other matters in the Rotary year ended 30 June 2024 or since that date which should have been reported to the Charity Commission.

Declaration

The Trustees declare that they have approved the Trustees' Report above.

Signed on behalf of the Trustees

Judith Pratt (Chairman)

Andy Harrison (Secretary)

5 September 2024

Independent Examiner's Report to the Trustees of the Rotary Club of Cuckfield and Lindfield Charitable Trust Fund ("Charitable Trust")

I report on the accounts of the Charitable Trust for the year ended 30 June 2024, which are set out on page 4.

Respective responsibilities of Trustees and Examiner

The Charity's Trustees are responsible for the preparation of the accounts. The Charity's Trustees consider that an audit is not required for the year ended 30 June 2024 under section 144(2) of the Charities Act 2011 (the 2011 Act) but that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145 (5)(b) of the 2011 Act; and
- to state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the Charitable Trust and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking 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 no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention, which gives me reasonable cause to believe that in any material respect:-

- the requirements to prepare accounts, which are in accord with the accounting records in accordance with section 130 of the 2011 Act have not been met,
- or that there are issues to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Don Miller-Jones
40 Sergison Road
Haywards Heath
RH16 1HX

5th September 2024

Attachment 1 - Rotary Club of Cuckfield & Lindfield Charitable Trust Fund
Registered Charity No. 1032500

Date	Comment	Total
01-Jul-23	Charity Bank balance	£14,186
Income		
	Darts 2024	£7,612
	Jaime Marathon	£4,592
	2024 Golf	£4,224
	Rotary Rocks 2023	£2,283
	Community Events & Collections	£2,172
	Xmas Letter Appeal	£1,991
	Xmas Cards & Appeal	£1,981
	Miscellaneous	£1,961
	Plumpton 18/12/23	£1,334
	Foundation	£1,200
	Pole to Pole	£1,130
	Rotary Rocks 2024	£1,097
	Burns Night 27/1/24	£709
	Murder Mystery	£558
	Wine Tasting 20/10/23	£499
Jul 23-Jun 24	Total	£33,343
Charity Donations		
	Chestnut Tree House	£7,000
	St Peter & St James	£4,000
	Hope House Haiti	£3,000
	Foundation/Polio+	£2,000
	Bentswood Hub CIC	£1,700
	RockingHorse	£1,500
	Suicide prevention course	£1,492
	Pole to Pole donations - JuPr	£1,200
	ShelterBox	£1,200
	Air Ambulance	£1,000
	Impact	£1,000
	Lend with Care	£1,000
	Kenya Deep Water Well	£912
	RYLA 24	£840
	Charity speaker donations - MiOI	£700
	Kids for Kids	£500
	STEM	£500
	Girl Guides	£300
	Time 4Children	£300
	Oathall Farm	£250
	Young Parkinsons	£238
	Grove Garden	£203
	Donations £200 or less	£1,370
Jul 23-Jun 24	Total	£32,205
01-Jul-24	Charity Bank balance	£15,324

Accounts

Rotary Club of Cuckfield & Lindfield Charitable Trust Fund

Registered Charity No. 1032500

Trustees' Annual Report for the year ended 30 June 2023

The Trustees are pleased to present the Annual Report of the Rotary Club of Cuckfield & Lindfield Charitable Trust Fund ("Charitable Trust") for the year ended 30 June 2023.

Reference and Administration

Trustees

The following trustees served throughout the Rotary year 1st July 2022 to 30th June 2023

.	
Mike Harper	Chairman
Andy Harrison	Secretary
Geoffrey Dew	Treasurer
Jaime Wallden	Trustee
Judith Pratt	Club president elect

Structure Governance and Management

Constitution

The Charitable Trust is constituted under a Trust Deed dated 18 January 1994. The Charitable Trust does not have a principal office nor does it have any employees. The Trustees are appointed annually by the members of the Club and are the serving officers on the Council of the Club for that year and other members of the club. The members of the Club volunteer their services to the Charitable Trust without payment. The Trustees have delegated to the Club's Council and members the responsibility of identifying suitable and worthy causes to support within the Charitable Trust's objectives and to manage the distribution of funds raised from events they have organised. The actions taken by the Club on behalf of the Charitable Trust are reviewed and approved by the Trustees.

Objectives

The principal objective of the Charitable Trust is to help those in need through donations and community service. Money is raised from fund raising events and personal donations from club members and the general public. All monies received are distributed to worthy causes that are considered by the Trustees to be for the public benefit. The Charitable Trust does not incur any administrative costs.

The Club is a member of Rotary International and participates with other Rotary Clubs in the UK and overseas in charitable fund-raising events.

Activities Undertaken for the Public Benefit

Annually the Trustees consider the governance and accounting procedures of the club and the need to meet the public benefit requirements. The Trustees confirm that they have paid due regard to the guidance issued by the Charity Commission on public benefit requirements when approving actions taken by the Club in distributing funds raised during the course of the year.

Achievements and Performance and Financial Review

The club organised several fund-raising events during the year. Monies were also raised from members, general donations and public collections. The total funds raised in the year amounted to net receipts of £28,025. Details of these events are shown in the attached accounts.

The Charitable Trust made donations from its own resources of £31,005. The beneficiaries comprised local hospices, schools and community support groups as well as international aid projects organised by the Rotary worldwide organisation and by the Trust. Details of the principal donations are shown in the attached accounts.

Policy on Reserves

The general aim of the Charitable Trust is not to hold reserves for the longer term, but to distribute during the year or shortly thereafter all funds raised. Accordingly at 30 June 2023 the Charitable Trust had a cash balance of £14,186 in the bank with plans to distribute the majority of these funds during July 2023 leaving a contingency of about £2,000. The Charitable Trust does not have any other assets or restricted funds.

Serious incidents

The Trustees confirm that there have been no serious incidents or other matters in the Rotary year ended 30 June 2023 or since that date which should have been reported to the Charity Commission.

Declaration

The Trustees declare that they have approved the Trustees' Report above.

Signed on behalf of the Trustees

Mike Harper (Chairman)

Andy Harrison (Secretary)

5 September 2023

Independent Examiner's Report to the Trustees of the Rotary Club of Cuckfield and Lindfield Charitable Trust Fund ("Charitable Trust")

I report on the accounts of the Charitable Trust for the year ended 30 June 2023, which are set out on page 4.

Respective responsibilities of Trustees and Examiner

The Charity's Trustees are responsible for the preparation of the accounts. The Charity's Trustees consider that an audit is not required for the year ended 30 June 2023 under section 144(2) of the Charities Act 2011 (the 2011 Act) but that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145 (5)(b) of the 2011 Act; and
- to state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the Charitable Trust and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking 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 no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention, which gives me reasonable cause to believe that in any material respect:-

- the requirements to prepare accounts, which are in accord with the accounting records in accordance with section 130 of the 2011 Act have not been met,
- or that there are issues to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Don Miller-Jones
40 Sergison Road
Haywards Heath
RH16 1HX

5th September 2023

Attachment 1 - Rotary Club of Cuckfield & Lindfield Charitable Trust Fund
Registered Charity No. 1032500

INCOME						
01-Jul-22	Charity Bank balance	17,166				
	2023 Darts	6,967				
	Community Events & Collections	5,838				
	2023 Golf	4,355				
	Gift Aid	3,420				
	Turkey Appeal	2,205				
	Car Boot	2,191				
	Miscellaneous	1,368				
	Burns Night 28/1/23	680				
	Foundation	531				
	Quiz 29/12/22	470				
30-Jun-23	Money Raised 2022/23	28,025				
DONATIONS						
	St Peters & St James	5,000				
	Turkey/Syria - Shelter box	3,946				
	Haiti teacher	2,500				
	Dementia UK - HHGC charity	1,750				
	Cruise Bereavement - HHGC	1,650				
	PRH League of Friends - HHGC	1,650				
	RYLA fees	1,648				
	Bentwood Hub - AdWo	1,450				
	Suicide awareness training - JuPr	1,388				
	Age UK West Sussex	1,250				
	Jamies Farm - GeHe	1,000				
	Ukraine housing	1,000				
	Chestnut Tree House	800				
	Foodbank	500				
	Foundation/Polio+	500				
	Kids for Kids	500				
	Lend with care	500				
	Shelterbox	500				
	Youth Speaks	455				
	Chaily Heritage	400				
	Oathall CC - Farm/Chef	600				
	FSW	250				
	Presentation Church soup kitchen	250				
	Sussex Clubs for Young people	250				
	Kids for Kids	250				
	British Legion - wreaths (3)	200				
	Miscellaneous (<£200)	818				
	Total Donations 2022-23	31,005				
30-Jun-23	Bank balance	14,186				
<u>Examiner's Report</u>						
I confirm that the foregoing Accounts & Bank Balances as at 30th June 2023						
are in accord with the records of the Rotary Club of Cuckfield Lindfield & Haywards Heath and its Trust Fund.						
Don Miller-Jones		Geoff Dew				
Honorary Examiner		Honorary Treasurer				
Date	5th September 2023					

Accounts

Rotary Club of Cuckfield & Lindfield Charitable Trust Fund

Registered Charity No. 1032500

Trustees' Annual Report for the year ended 30 June 2022

The Trustees are pleased to present the Annual Report of the Rotary Club of Cuckfield & Lindfield Charitable Trust Fund ("Charitable Trust") for the year ended 30 June 2022.

Reference and Administration

Trustees

The following trustees served throughout the year ended 30 June 2022

Jaime Wallden	Chairman (current club president)
Margaret Gooch	Secretary
Geoffrey Dew	Treasurer
Mike Harper	Club president elect
Andy Harrison	Immediate past club president

On 17 June 2021 Jaime Wallden was appointed Chairman of the Trustees in place of Andy Harrison who having served his one year term of office as President of the Rotary Club of Cuckfield & Lindfield ("the Club"), stepped down as Chairman.

Structure Governance and Management

Constitution

The Charitable Trust is constituted under a Trust Deed dated 18 January 1994. The Charitable Trust does not have a principal office nor does it have any employees. The Trustees are appointed annually by the members of the Club and are the serving officers on the Council of the Club for that year and other members of the club. The members of the Club volunteer their services to the Charitable Trust without payment. The Trustees have delegated to the Club's Council and members the responsibility of identifying suitable and worthy causes to support within the Charitable Trust's objectives and to manage the distribution of funds raised from events they have organised. The actions taken by the Club on behalf of the Charitable Trust are reviewed and approved by the Trustees.

Objectives

The principal objective of the Charitable Trust is to help those in need through donations and community service. Money is raised from fund raising events and personal donations from club members and the general public. All monies received are distributed to worthy causes that are considered by the Trustees to be for the public benefit. The Charitable Trust does not incur any administrative costs.

The Club is a member of Rotary International and participates with other Rotary Clubs in the UK and overseas in charitable fund-raising events.

Activities Undertaken for the Public Benefit

Annually the Trustees consider the governance and accounting procedures of the club and the need to meet the public benefit requirements. The Trustees confirm that they have paid due regard to the guidance issued by the Charity Commission on public benefit requirements when approving actions taken by the Club in distributing funds raised during the course of the year.

Achievements and Performance and Financial Review

The club organised several fund-raising events during the year. Monies were also raised from members, general donations and public collections. The total funds raised in the year amounted to receipts of £29,068 less material expenses of £6,093. Details of these events and other net income received are shown in the attached accounts.

The Charitable Trust made donations from its own resources of £16,895. The beneficiaries comprised local hospices, schools and community support groups as well as international aid projects organised by the Rotary worldwide organisation and by the Trust. Details of the principal donations are shown in the attached accounts.

Policy on Reserves

The general aim of the Charitable Trust is not to hold reserves for the longer term, but to distribute during the year or shortly thereafter all funds raised. Accordingly at 30 June 2022 the Charitable Trust had a cash balance of £15,845 in the bank with plans to distribute the majority of these funds during July 2022 leaving a contingency of about £2,000. The Charitable Trust does not have any other assets or restricted funds.

Serious incidents

The Trustees confirm that there have been no serious incidents or other matters in the year ended 30 June 2022 or since that date which should have been reported to the Charity Commission.

Declaration

The Trustees declare that they have approved the Trustees' Report above.

Signed on behalf of the Trustees

Jaime Wallden (Chairman)

Margaret Gooch (Secretary)

5 September 2022

Independent Examiner's Report to the Trustees of the Rotary Club of Cuckfield and Lindfield Charitable Trust Fund ("Charitable Trust")

I report on the accounts of the Charitable Trust for the year ended 30 June 2022, which are set out on page 4.

Respective responsibilities of Trustees and Examiner

The Charity's Trustees are responsible for the preparation of the accounts. The Charity's Trustees consider that an audit is not required for the year ended 30 June 2021 under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- ☐ examine the accounts under section 145 of the 2011 Act;
- ☐ to follow the procedures laid down in the general Directions given by the Charity Commission under section 145 (5)(b) of the 2011 Act; and
- ☐ to state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the Charitable Trust and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking 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 no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention, which gives me reasonable cause to believe that in any material respect:-

- ☐ the requirements to prepare accounts, which are in accord with the accounting records in accordance with section 130 of the 2011 Act have not been met,
- ☐ or that there are issues to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Nigel Vokes
7 Blunts Wood Road
Haywards Heath
RH16 1ND

5th September 2022

Attachment 1 - Rotary Club of Cuckfield & Lindfield Charitable Trust Fund

Registered Charity No. 1032500

RCCL CHARITY TRUST FUND					
		Revenue	Expenses		Net
	Opening Bank Balance 30/6/21				£9,766
INCOME 2021-22					
	Jaime Marathon	£8,885	£0		£8,885
	2022 Golf	£5,728	£2,164		£3,564
	Miscellaneous	£2,971	£150		£2,822
	Community Events & Collections	£2,014	£40		£1,974
	Gift Aid	£1,624	£0		£1,624
	2021 Golf	£3,963	£2,475		£1,488
	Christmas 2021	£1,104	£0		£1,104
	Murder Mystery	£2,147	£1,125		£1,022
	Foundation	£632	£0		£632
	Magic	£0	£140		-£140
	TOTAL	£29,068	£6,093		£32,741
Note 1 - Additional £1,900 raised through direct donations to Foundation by club members					
DONATIONS 2021-22					
	Ukraine Appeal	£2,000			
	St Peter & St James	£1,960			
	Hope House Haiti	£1,800			
	Woodlands Mead	£1,750			
	Foundation/Polio+	£1,732			
	RYLA fees	£1,630			
	Langley Green - plants	£1,171			
	Chestnut Tree House	£1,000			
	Memory Café	£1,000			
	Scout Jamboree	£600			
	School books - Barrington Stoke	£535			
	Salvation Army	£530			
	Kids for Kids	£500			
	Donation £200 or less	£688			
	TOTAL				£16,895
	Closing Bank Balance 30/6/2022				£15,845
Examiner's Report					
I confirm that the foregoing Accounts & Bank Balances as at 30th June 2022 are in accord with the records of the Rotary Club of Cuckfield and Lindfield and its Trust Fund.					
Nigel Vokes		Geoff Dew			
Honorary Examiner		Honorary Treasurer			
Date	6th September 2022				