



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day	Month	Year		Day	Month	Year
	01	July	2022		30	June	2023

Section A

Reference and administration details

Charity name

LUDLOW ROTARY CLUB CHARITABLE TRUST

Other names charity is known by

Registered charity number (if any)

250736

Charity's principal address

The Feathers Hotel

The Bullring

LUDLOW

Postcode

SY8 1AA

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Hilary DELANEY-HALL	President		
2	Dr Robert James HODGE	Vice-President and Treasurer		
3	Linda CHARIE	Secretary		
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Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	DECLARATION OF TRUST DATED 29 NOVEMBER 1966
How the charity is constituted (eg. trust, association, company)	Trust
Trustee selection methods (eg. appointed by, elected by)	Elected by members of the Rotary Club of Ludlow

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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Summary of the objects of the charity set out in its governing document

a. the relief of poverty and distress by direct payments to individuals in necessitous circumstances or by contributions to such charitable organisations or funds already existing for this purpose. b. the advancement of education by contribution to such educational organisations or funds established for charitable purposes.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The Trust manages fund-raising activities throughout the year in order to benefit charities and deserving causes determined by the members of the Rotary Club of Ludlow

The Trustees have regard to the guidance issued by the Charity Commission on public benefit and ensure that newly appointed trustees are familiar with that guidance

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

2022-2023 was a significant improvement over 2021-2022 in regard to fund raising and donations made. The removal of COVID restrictions meant that the annual Dog Day event could be run again in July 2022. Funds raised allowed substantial donations to two major organisations and several local causes. A concert in aid of Ukraine refugees raised £2300.

Section E

Financial review

Brief statement of the charity's policy on reserves

The Trust maintains a reserve of £5,000 for major events, plus lesser amounts for emergencies, youth services and causes nominated by the president.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Sources of funds fund-raising events and donations.

Expenditure is primarily on running costs for events. The annual Dog Day event gives rise to considerable costs, which are rising year to year, but has in general produced a significant profit.

The trustees have no investment policy as there are no capital funds available.


Section F**Other optional information**

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Section G**Declaration**

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Dr Robert James HODGE	
Position (eg Secretary, Chair, etc)	Vice-President and Treasurer	
Date	16 December 2023	