

APPENDIX 1



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	10	2023	To	30	09	2024

Reference and administration details

Charity name	St Andrews Chalmers Institute
Other names charity is known by	
Registered charity number	SC46001
Charity's principal address	

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			
2			
3			
4			
5			
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

The governance, management and administration of the organisation will be the responsibility of the charity trustees who are also the only trustees of the organisation.

The charity is a Scottish Charitable Incorporated Organisation (SCIO). It was registered in its current legal form on 24th of September 2015. The charity was previously an unincorporated association but changed its legal form to a SCIO on 24th September 2015. It has a single tier structure and as such the trustees are members of the SCIO.

Trustee recruitment and appointment

The members of the steering group, which normally meet four times a year, are charity trustees. New trustees are nominated by existing trustees. The number of charity trustees will not be less than four at any time, and the maximum number of trustees will be determined by the charity trustees.

Objectives and activities

Charitable purposes

The organisation's purposes are the advancement of the Christian religion: to promote the Christian religion, principally in St Andrews and the surrounding area but also throughout Scotland, elsewhere in the UK and the world; to encourage Christian leadership principles through (a) leadership development training focused on biblical content with an emphasis on developing the participants' Christian character and leadership skills (b) regular and one-off training events as well as personal one-on-one mentoring, (c) developing teaching materials that can be used more widely and (d) a study fellowship for pastor-theologians pursuing doctoral work.

Summary of the main activities in relation to these objects

We run a weekly Learning Community designed to support and develop participants in their Christian leadership. Graduate Learning Exchange evenings provide opportunities for scholars to present their research to non-specialists for the benefit of both the academy and the church. Training conferences for identified emerging leaders aim to develop their Christian character and leadership skills. The charity supports and mentors pastor-theologians through their academic studies. Chalmers has also developed a research project examining Christian education and formation in churches. Alongside this Chalmers is developing a journal in public theology designed to equip and resource leaders.

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Achievements and performance

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

The charity has fulfilled its charitable purposes in promoting the Christian religion and encouraging leadership principles.

The Learning Community ran with an in-person course with 17 leaders. This considered key Christian leaders and spiritual disciplines through the history of the church. An on-line reading group with 16 leaders considered what it means to be human.

The charity's Fellowships for pastor-theologians continued. One graduated with their PhD and a new one joined the program. As part of their development they contributed to the Learning Community courses and attended a retreat for mutual encouragement.

We ran a January conference, where 29 leaders gathered for a home-based time of rest and teaching on a Biblical view of community.

The project researching what is happening in terms of Christian education in Scotland's Churches, what worldview is held and how they are manifested in the day-to-day living of Christians in Scotland continued. This included a cohort of 7 Christian leaders who were interviewed and then started meeting monthly to discuss relevant texts and feed into the project.

Financial review

Brief statement of the charity's policy on reserves

The charity is funded through annual grants from a small number of trust funds, individual donations, and participant fees from our Learning Community and Conferences. The Chalmers Institute operates with a small team, no employees, and it is therefore believed at this stage that we can operate with minimal reserves.

Details of any deficit

The charity operated at a surplus this financial year and ended the year with a healthy balance in its account.

Donated facilities and services (if any)

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)	<div></div>	
Full name(s)		
Position (e.g. Chair)	Chair	Trustee
Date	01/04/2025	01/04/2025

St. Andrews Chalmers Institute

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Receipts and payments accounts

For the period from	Period start date			to	Period end date		
	Day	Month	Year		Day	Month	Year
	01	10	2023		30	09	2024

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	32,243				32,243	28,420
Legacies	-	-			-	
Grants	39,681	-			39,681	67,506
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	6,103	-			6,103	5,057
					-	
A1 Sub total	78,027	-	-	-	78,027	100,983
A2 Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
A2 Sub total	-	-	-	-	-	-
Total receipts	78,027	-	-	-	78,027	100,983
A3 Payments						
Expenses for fundraising activities					-	
Gross trading payments					-	
Investment management costs					-	
Payments relating directly to charitable activities	54,451				54,451	69,260
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
Other					-	
					-	
A3 Sub total	54,451	-	-	-	54,451	69,260
A4 Payments relating to asset and investment movements						
Purchases of fixed assets					-	
Purchase of investments					-	
A4 Sub total	-	-	-	-	-	-
Total payments	54,451	-	-	-	54,451	69,260
Net receipts / (payments)	23,576	-	-	-	23,576	31,723
A5 Transfers to / (from) funds					-	
Surplus / (deficit) for year	23,576	-	-	-	23,576	31,723

Section B Statement of balances

Categories	Details	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 £
B1 Cash funds	Cash and bank balances at start of year	44,826				44,826	13,103
	Surplus / (deficit) shown on receipts and payments account	23,576	-			23,576	31,723
						-	
						-	
	Cash and bank balances at end of year	68,402	-	-	-	68,402	44,826
	(Agree balances with receipts and payments account(s))	-	-	-	-	-	-

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

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

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

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

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

Signature

Print Name

Date of
approval

			01 April 2025
			01 April 2025

Section C Notes to the Accounts

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

C2 Grants

Type of activity or project supported	Individual / institution	Number of grants made	£
Total			-

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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Authority under which paid

£

C3b Trustee remuneration - details

Teaching on Learning Community Course Honorarium	3,000

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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Number of trustees

£

C4b Trustee expenses - details

C5 Transactions with trustees and connected persons

Nature of relationship	Nature of transaction	Transaction amount (£)	Balance outstanding at period end (£)

C6 Other information

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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 £
Donations from individuals	32,243	-			32,243	28,330
					-	90
					-	
					-	
Total	32,243	-	-	-	32,243	28,420
	-	-	-	-	-	-

2 Grants

	Unrestricted funds to nearest £	Restricted funds to nearest £			Total current period to nearest £	Total last period to nearest £
World Charitable Foundation					-	28,156
Maclellan Foundation	39,681				39,681	39,350
					-	
					-	
Total	39,681	-			39,681	67,506
	-	-	-	-	-	-

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 £
Learning Community	2,602				2,602	3,205
Conferences	3,201				3,201	1,852
Other	300				300	
					-	
					-	
					-	
					-	
Total	6,103	-	-	-	6,103	5,057
	-	-	-	-	-	-

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 £
Administrative support remuneration	10,000				10,000	10,000
Office and Administrative cost	508				508	838
Learning community weekly costs	9,739				9,739	856
Graduate Learning Exchange & Lecture costs	164				164	
Scholars Fund	11,797				11,797	32,234
Scholars Retreat	-				-	1,031
Conference costs	2,804				2,804	1,726
Publishing costs	-				-	3,511
Worldview project	19,439				19,439	12,064
Invest Programme	-				-	7,000
					-	
Total	54,451	-	-	-	54,451	69,260
	-	-	-	-	-	-

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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
Receipts						
Donations	32,243				32,243	27,470
Legacies					-	
Grants	39,681				39,681	67,506
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	6,103				6,103	5,057
Sub total	78,027	-	-	-	78,027	100,033
Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
Sub total	-	-	-	-	-	-
Total receipts	78,027	-	-	-	78,027	100,033
Payments						
Expenses for fundraising activities					-	
Gross trading payments					-	
Investment management costs					-	
Payments relating directly to charitable activities	54,451				54,451	66,276
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
					-	
					-	
Sub total	54,451	-	-	-	54,451	66,276
Payments relating to asset and investment movements						
Purchases of fixed assets					-	
Purchase of investments					-	
Sub total	-	-	-	-	-	-
Total payments	54,451	-	-	-	54,451	66,276
Net receipts / (payments)	23,576	-	-	-	23,576	33,757
Transfers to / (from) funds	-				-	(824)
Surplus / (deficit) for year	23,576	-	-	-	23,576	32,933
Nature and purpose of funds						



Office of the Scottish Charity Regulator

	Independent examiner's report on the accounts v2						
Report to the trustees/members of	Charity name St Andrews Chalmers Institute						
	Registered charity number SC046001						
	Period start date				Period end date		
	Day	Month	Year		Day	Month	Year
On the accounts of the charity for the period	01	10	2023	to	30	09	2024
Set out on pages	1 to 9						
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. 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 Charities Accounts (Scotland) Regulations 2006. 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 accounts.						
Independent examiner's statement	In the course of my examination, no matter has come to my attention 1. which gives me reasonable cause to believe that in any material respect the requirements: <ul style="list-style-type: none">to keep accounting records in accordance with section 44(1) (a) of the 2005 Act and Regulation 4 of the 2006 Accounts Regulations, andto 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 understanding of the accounts to be reached.						
Signed:				Date:	01/04/2025		
Name:							
Relevant professional qualification(s) or body (if any):	ICAS						
Address:							