

APPENDIX 1

OSCr

Office of the Scottish Charity Regulator

Trustees' Annual Report for the period							
Period start date				Period end date			
From	Day	Month	Year	To	Day	Month	Year
	01	04	24		31	03	25

Reference and administration details

Charity name	SUSTAINABLE WEST LINTON AND DISTRICT
Other names charity is known by	SWLD
Registered charity number	SC050224
Charity's principal address	c/o West Linton Village Centre Raemartin Square West Linton Scottish Borders Postcode EH46 7ED

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		Management Committee
2	Co-Chair	From 24 March 2025	
3	Treasurer	From 31 July 2025	
4	Secretary	From 24 March 2025	
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

To 30 September 2024

To 24 March 2025

To 11 July 2025

Structure, governance and management

Type of governing document

SWLD is a Scottish Charitable Incorporated Organisation (SCIO) governed by its Constitution.

Trustee recruitment and appointment

Potential trustees are identified by local community members and members of the Board of Trustees and are appointed by the Management Committee (ref. para 59 of the Constitution).

Objectives and activities

Charitable purposes

The Charity's constitutional objectives are: -

The advancement of environmental improvement in West Linton by identifying and accomplishing environmental projects which benefit the local community, increase environmental sustainability and support sustainable living, whilst working towards zero waste for West Linton. The advancement of education by providing learning opportunities for vocational skills and training which are of benefit to all ages and abilities, increase employment opportunity and allow individual enhanced contribution towards improving lifestyles, the local environment, and environmental sustainability.

Summary of the main activities in relation to these objects

West Linton's 'Roamers Wood' community woodland project.

The Rare Varieties Project to establish a pear and apple genetic "library" to futureproof varieties under threat.

The "Pick My Fruit" project to redistribute surplus fruit.

The Community Thermal Action Project to improve awareness of housing heating efficiency.

The Borders Roll Out Project to assist other Borders communities in setting up their own Heat Teams.

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Achievements and performance

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

Roamers Wood continued to provide exceptional educational and scientific research opportunities.

There was continued engagement with West Linton Primary School pupils on environmental projects and scientists from Edinburgh University continued to conduct research.

Plans were initiated to widen access and inclusivity at Roamers Wood through the provision of an all-ability parking space with access and further path improvement.

A community planting planted around 1000 trees.

Maintenance work was carried out on mature trees at Roamers Wood to ensure a continued safe environment for users.

Berry Lane, an avenue of fruit-bearing bushes providing berries for local people to pick and to provide feed for wildlife, was extended.

Polli Alley, a pollinator alley of wildflowers, was further developed.

The Roamers Wood website was enhanced.

The Rare Varieties Project grafted and planted 170 rare variety apple and pear trees.

The "Pick My Fruit" project continued to make use of apples and rhubarb which would otherwise go to waste and ensured the fruit was usefully used.

The Community Thermal Action Project continued to improve awareness of housing heating efficiency through provision of free thermal surveys.

The Borders Roll Out Project provided training, support, marketing assets and software to other Borders communities setting up their own Heat Teams.

Financial review

Brief statement of the charity's policy on reserves

The Charity funds each project on a stand-alone basis from grants and contributions received from third parties.

Should funding in any financial year exceed outgoings then any such reported surpluses are used to fund future projects.

Any unutilised designated funding is carried forward to meet specific activities.

On this basis the Trustees do not plan for the growth of unrestricted reserves.

Details of any deficit

During the year the charity received £28732 principally from donations, grants and fundraising, including £8600 from a grant, the expenditure relating to which will take place following the year end, leaving £20132 of receipts relating to the year ended 31 March 2025. The charity paid out £16535 on payments relating directly to charitable activities. The result was a surplus for the year of £12197 of which £3597 related to the year ended 31 March 2025.

Donated facilities and services (if any)

The charity is founded on the involvement of the local village community. The Trustees are grateful for the hard work of a number of dedicated individuals and the support of many volunteers giving their time and energy to improve the local environment.

3**APPENDIX 1****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)

Full name(s)

Position (e.g. Chair) Co-CHAIR

TREASURER

Date

31/10/25

31:10:25



Receipts and payments accounts						
For the period from				to		
	01	04	2024		31	03
						2025

Section A Statement of receipts and payments

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total funds current period to nearest £	Total funds last period to nearest £
A1 Receipts						
Donations	655	6,386			7,041	5,392
Legacies					-	-
Grants		20,852			20,852	30,169
Receipts from fundraising activities		690			690	1,554
Gross trading receipts		59			59	
Income from investments other than land and buildings					-	
Rents from land & buildings					-	
Gross receipts from other charitable activities	90				90	
					-	
A1 Sub total	745	27,987	-	-	28,732	37,115
A2 Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	-
Proceeds from sale of investments					-	-
A2 Sub total	-	-	-	-	-	-
Total receipts	745	27,987	-	-	28,732	37,115
A3 Payments						
Expenses for fundraising activities					-	-
Gross trading payments					-	-
Investment management costs					-	-
Payments relating directly to charitable activities	251	16,786			16,535	18,565
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
Other					-	
					-	
A3 Sub total	251	16,786	-	-	16,535	18,565
A4 Payments relating to asset and investment movements						
Purchases of fixed assets					-	18,858
Purchase of investments					-	
A4 Sub total	-	-	-	-	-	18,858
Total payments	251	16,786	-	-	16,535	37,423
Net receipts / (payments)	996	11,201	-	-	12,197	(308)
A5 Transfers to / (from) funds	(564)	564			-	
Surplus / (deficit) for year	432	11,765	-	-	12,197	(308)

Section B Statement of balances

		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	2,461	2,468			4,929	5,237
	Surplus / (deficit) shown on receipts and payments account	432	11,765			12,197	(308)
						-	
						-	
	Cash and bank balances at end of year	2,893	14,233	-	-	17,126	4,929
	(Agree balances with receipts and payments account(s))						

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

	Details	Fund to which asset belongs	Cost (if available)	Current value (if available)	Last year
			to nearest £	to nearest £	to nearest £
B3 Other assets	Thermal Cameras x 6	Thermal Fund	18,598	4,500	9,299
	Refurbished Lenovo Laptop	Thermal Fund	260	87	173
		Total	18,858	4,587	9,472

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

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

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

Signature*

Print Name

Date of
approval

			31/10/25
			31/10/25

Sustainable West Linton and District

SC050224

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 £
General	655				655	509
Thermal Project		2,538			2,538	740
Roamers Wood		3,800			3,800	4,143
West Linton Orchard		48			48	-
Total	655	6,386	-	-	7,041	5,392

2 Grants

	Unrestricted funds to nearest £	Restricted funds to nearest £	Total current period to nearest £	Total last period to nearest £
General			-	1,519
Thermal Project		500	500	27,796
Borders Roll Out		10,161	10,161	-
Roamers Wood and Related Projects		10,191	10,191	854
Total	-	20,852	20,852	30,169

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 £
Bank error compensation	90				90	
					-	
					-	
					-	
					-	
					-	
					-	
Total	90	-	-	-	90	-

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 £
Roamers Wood		6,068			6,068	8,484
Borders Roll Out Heat Team Project		8,920			8,920	
Thermal Project Heat Team Project		1,798			1,798	8,770
Educational Resources		-			-	814
General Fund	- 251				- 251	360
Carllops Rockfield		-			-	137
					-	
					-	
					-	
Total	- 251	16,786	-	-	16,535	18,565

Sustainable West Linton and District

SC050224

Additional analysis (3)

6 Breakdown of restricted funds

	Thermal Fund	Borders Roll Out Fund	Roamers Wood and Related Project Funds	West Linton Orchard Fund	Total restricted funds	Total restricted funds last period
Receipts						
Donations	2,538		3,800	48	6,386	4,883
Legacies					-	-
Grants	500	10,161	10,191		20,852	30,169
Receipts from fundraising activities			690		690	1,554
Gross trading receipts	59				59	-
Income from investments other than land and buildings					-	-
Rents from land & buildings					-	-
Gross receipts from other charitable activities					-	-
Sub total	3,097	10,161	14,681	48	27,987	36,606
Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	-
Proceeds from sale of investments					-	-
Sub total	-	-	-	-	-	-
Total receipts	3,097	10,161	14,681	48	27,987	36,606
Payments						
Expenses for fundraising activities					-	-
Gross trading payments					-	-
Investment management costs					-	-
Payments relating directly to charitable activities	1,798	8,920	6,068		16,786	18,205
Grants and donations					-	-
Governance costs:					-	-
Audit / independent examination					-	-
Preparation of annual accounts					-	-
Legal costs					-	-
Sub total	1,798	8,920	6,068	-	16,786	18,205
Payments relating to asset and investment movements						
Purchases of fixed assets					-	18,858
Purchase of investments					-	-
Sub total	-	-	-	-	-	18,858
Total payments	1,798	8,920	6,068	-	16,786	37,063
Net receipts / (payments)	1,299	1,241	8,613	48	11,201	(457)
Transfers to / (from) funds			564		564	1,268
Surplus / (deficit) for year	1,299	1,241	9,177	48	11,765	811

Nature and purpose of funds

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APPENDIX 3



Independent examiner's report on the accounts

v2

Report to the trustees/members of

Charity name

SUSTAINABLE WEST LINTON and DISTRICT

Registered charity number

SC050224

On the accounts of the charity for the period

Period start date

01 Day 04 Month 2024 Year

To

Period end date

31 Day 03 Month 2025 Year

Set out on pages

Appendix 1 (pages 1 to 4) and Appendix 2 (sections A to C and additional analysis pages 1 and 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

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 understanding of the accounts to be reached.

Signed:

Name:

Date:

31/10/25

Relevant professional qualification(s) or body (if any):

Institute of Chartered Accountants of Scotland

Address:

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