

# Rose Duncan Community Foundation

Scotland · Charity number SC051381

## Details

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|            |                                                      |
|------------|------------------------------------------------------|
| Status     | Active                                               |
| Legal form | SCIO (Scottish Charitable Incorporated Organisation) |
| Registered | 2021-11-05                                           |
| Register   | <a href="#">View on the OSCR register</a>            |

## Contact

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|         |                                                   |
|---------|---------------------------------------------------|
| Address | 205 Shuna Square<br>Glenrothes<br>Fife<br>KY7 6RH |
|---------|---------------------------------------------------|

## Activities

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**Activities:** 'It carries out activities or services itself'

**Purposes:** 'the advancement of health', 'the advancement of citizenship or community development', 'the provision of recreational facilities, or the organisation of recreational activities, with the object of improving the conditions of life for the persons for whom the facilities or activities are primarily intended', 'the relief of those in need by reason of age, ill-health, disability, financial hardship or other disadvantage'

**What the charity does:** Rose Duncan Community Foundation, in its second operational year has built on the success achieved in its first year. The new premises has assisted with delivery of all activities. A wider range of differing activities have been delivered, including peer-led interactive workshops, 1-1 health consultations, moral and emotional support and clinical support services. Support services included homeopathy, Asma care, podiatry, coping with depression, health coaching for anxiety, menopause and insomnia. We have supported over 1,000 people and in partnership with specialist agencies have supported a range of health conditions. The Board of Trustees are totally committed to the ethos and development of "social prescribing", community health and wellbeing, physical and mental health programmes and educational facilities with the ultimate goal of enhancing collective wellbeing.

**Beneficiaries:** 'People with disabilities or health problems'

**Objectives:** To help people improve their health through the provision of local health services which will tackle and support a wide range of health conditions. The provision of recreational facilities, or the organisation of recreational activities, with the object of improving the conditions of life for the persons for whom the facilities or activities are primarily intended. To advance active citizenship /community development. The relief of those in need by reason of age, ill-health, disability, financial hardship or other disadvantage. Enhance and support the elderly, infirm and vulnerable who are fragile and isolated.

## Geography

- **Main operating location:** Fife
- **Geographical spread:** Wider, but within one local authority area

## Finances

| Period end | Income  | Expenditure | Assets | Employees |
|------------|---------|-------------|--------|-----------|
| 2025-11-30 | £0      | £0          | -      | 0         |
| 2024-11-30 | £10,654 | £7,925      | -      | 0         |
| 2023-11-30 | £36,592 | £35,132     | -      | 0         |
| 2022-11-30 | £39,278 | £21,225     | -      | 0         |

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# Accounts

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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                                   | 1   | 12    | 2023 | To              | 30  | 11    | 24   |

Reference and administration details

Charity name  
Other names charity is known by  
Registered charity number  
Charity's principal address

|                                  |
|----------------------------------|
| Rose Duncan Community Foundation |
|                                  |
| SC051381                         |
| 205 Shuna Square                 |
| Glenrothes                       |
| Fife                             |
| Postcode KY7 6RH                 |

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  |              | Chairperson     |                                   |                                                               |
| 2  |              | Treasurer       |                                   |                                                               |
| 3  |              | Secretary       |                                   |                                                               |
| 4  |              | Trustee         |                                   |                                                               |
| 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

Constitution

Trustee recruitment and appointment

The charity advertises through Fife Voluntary Action to recruit Trustees and also directly through our social media platforms. Potential Trustees are invited to express their interest. They are asked to submit a letter or email with their past or current work experience and/or volunteering experience inclusive of their knowledge, experience and specialisms. They are invited to attend a trustee meeting at the beginning of a scheduled meeting to speak and meet existing Trustees. If successful they are given a welcome pack, which includes roles and responsibilities of being a charity Trustee. Two references are required.

## Objectives and activities

Charitable purposes

- The advancement of health.
- The provision of recreational facilities, or the organisation of recreational activities with the object of improving the conditions of life for the person for whom the facilities of activities are primarily intended.
- The advancement of citizenship or community development.
- The relief of those in need by reason of age, ill health, disability, financial hardship or another disadvantage.

Summary of the main activities in relation to these objects

- To advance health inequalities which will ensure that individuals, families and communities are able to access health services which will help them have a quality of life enabling them to reach their full potential.
- The provision of recreational facilities, or the organisation of recreational activities with the object of improving the conditions of life for the person for whom the facilities or activities are primarily intended.
- The advancement of citizenship or community development.

## APPENDIX 1

### Achievements and performance

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

Rose Duncan Community Foundation, in its second operational year has built on the success achieved in its first year. The new premises has assisted with delivery of all activities.

A wider range of differing activities have been delivered, including peer-led interactive workshops, 1-1 health consultations, moral and emotional support and clinical support services.

Support services included homeopathy, Asma care, podiatry, coping with depression, health coaching for anxiety, menopause and insomnia.

We have supported over 1,000 people and in partnership with specialist agencies have supported a range of health conditions.

The Board of Trustees are totally committed to the ethos and development of "social prescribing", community health and wellbeing, physical and mental health programmes and educational facilities with the ultimate goal of enhancing collective wellbeing.

### Financial review

#### Brief statement of the charity's policy on reserves

It is the intention of the Trustees of Rose Duncan Community Foundation to facilitate a reserve fund of 2-3 months of operating costs and we currently have 20 months in reserve.

#### Details of any deficit

#### Donated facilities and services (if any)

## 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) |  |  |
| Date                  |  |  |

## Rose Duncan Community Foundation

SC051381



| Receipts and payments accounts |                   |       |      |    |                 |       |      |
|--------------------------------|-------------------|-------|------|----|-----------------|-------|------|
| For the period from            | Period start date |       |      | to | Period end date |       |      |
|                                | Day               | Month | Year |    | Day             | Month | Year |
|                                | 1                 | 12    | 2023 |    | 30              | 11    | 2024 |

## Section A Statement of receipts and payments

|                                                               | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Expendable endowment funds<br>to nearest £ | Permanent endowment funds<br>to nearest £ | Total funds current period<br>to nearest £ | Total funds last period<br>to nearest £ |
|---------------------------------------------------------------|------------------------------------|----------------------------------|--------------------------------------------|-------------------------------------------|--------------------------------------------|-----------------------------------------|
| <b>A1 Receipts</b>                                            |                                    |                                  |                                            |                                           |                                            |                                         |
| Donations                                                     | 8,297                              |                                  |                                            |                                           | 8,297                                      |                                         |
| Legacies                                                      |                                    |                                  |                                            |                                           | -                                          |                                         |
| Grants                                                        | -                                  | -                                |                                            |                                           | -                                          | 29,983                                  |
| Receipts from fundraising activities                          | 2,357                              | -                                |                                            |                                           | 2,357                                      | 6,609                                   |
| Gross trading receipts                                        |                                    |                                  |                                            |                                           | -                                          |                                         |
| Income from investments other than land and buildings         |                                    |                                  |                                            |                                           | -                                          |                                         |
| Rents from land & buildings                                   |                                    |                                  |                                            |                                           | -                                          |                                         |
| Gross receipts from other charitable activities               |                                    |                                  |                                            |                                           | -                                          |                                         |
|                                                               |                                    |                                  |                                            |                                           | -                                          |                                         |
| <b>A1 Sub total</b>                                           | <b>10,654</b>                      | <b>-</b>                         | <b>-</b>                                   | <b>-</b>                                  | <b>10,654</b>                              | <b>36,592</b>                           |
| <b>A2 Receipts from asset &amp; investment sales</b>          |                                    |                                  |                                            |                                           |                                            |                                         |
| Proceeds from sale of fixed assets                            |                                    |                                  |                                            |                                           | -                                          |                                         |
| Proceeds from sale of investments                             |                                    |                                  |                                            |                                           | -                                          |                                         |
| <b>A2 Sub total</b>                                           | <b>-</b>                           | <b>-</b>                         | <b>-</b>                                   | <b>-</b>                                  | <b>-</b>                                   | <b>-</b>                                |
| <b>Total receipts</b>                                         | <b>10,654</b>                      | <b>-</b>                         | <b>-</b>                                   | <b>-</b>                                  | <b>10,654</b>                              | <b>36,592</b>                           |
| <b>A3 Payments</b>                                            |                                    |                                  |                                            |                                           |                                            |                                         |
| Expenses for fundraising activities                           | -                                  | -                                |                                            |                                           | -                                          | 5,823                                   |
| Gross trading payments                                        |                                    |                                  |                                            |                                           | -                                          |                                         |
| Investment management costs                                   |                                    |                                  |                                            |                                           | -                                          |                                         |
| Payments relating directly to charitable activities           | 7,925                              | -                                |                                            |                                           | 7,925                                      | 29,309                                  |
| Grants and donations                                          |                                    |                                  |                                            |                                           | -                                          |                                         |
| Governance costs:                                             |                                    |                                  |                                            |                                           | -                                          |                                         |
| Audit / independent examination                               |                                    |                                  |                                            |                                           | -                                          |                                         |
| Preparation of annual accounts                                |                                    |                                  |                                            |                                           | -                                          |                                         |
| Legal costs                                                   |                                    |                                  |                                            |                                           | -                                          |                                         |
| Other                                                         |                                    |                                  |                                            |                                           | -                                          |                                         |
|                                                               |                                    |                                  |                                            |                                           | -                                          |                                         |
| <b>A3 Sub total</b>                                           | <b>7,925</b>                       | <b>-</b>                         | <b>-</b>                                   | <b>-</b>                                  | <b>7,925</b>                               | <b>35,132</b>                           |
| <b>A4 Payments relating to asset and investment movements</b> |                                    |                                  |                                            |                                           |                                            |                                         |
| Purchases of fixed assets                                     |                                    |                                  |                                            |                                           | -                                          |                                         |
| Purchase of investments                                       |                                    |                                  |                                            |                                           | -                                          |                                         |
| <b>A4 Sub total</b>                                           | <b>-</b>                           | <b>-</b>                         | <b>-</b>                                   | <b>-</b>                                  | <b>-</b>                                   | <b>-</b>                                |
| <b>Total payments</b>                                         | <b>7,925</b>                       | <b>-</b>                         | <b>-</b>                                   | <b>-</b>                                  | <b>7,925</b>                               | <b>35,132</b>                           |
| <b>Net receipts / (payments)</b>                              | <b>2,729</b>                       | <b>-</b>                         | <b>-</b>                                   | <b>-</b>                                  | <b>2,729</b>                               | <b>1,460</b>                            |
| <b>A5 Transfers to / (from) funds</b>                         |                                    |                                  |                                            |                                           | -                                          |                                         |
| <b>Surplus / (deficit) for year</b>                           | <b>2,729</b>                       | <b>-</b>                         | <b>-</b>                                   | <b>-</b>                                  | <b>2,729</b>                               | <b>1,460</b>                            |

## Section B Statement of balances

| Categories                                                     | Details                                                                                                | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Expendable endowment funds<br>to nearest £ | Permanent endowment funds<br>to nearest £ | Total current period<br>to nearest £         | Total last period<br>to nearest £ |
|----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|------------------------------------|----------------------------------|--------------------------------------------|-------------------------------------------|----------------------------------------------|-----------------------------------|
| <b>B1 Cash funds</b>                                           | Cash and bank balances at start of year                                                                | 716                                | 18,797                           |                                            |                                           | 19,513                                       | 18,053                            |
|                                                                | Surplus / (deficit) shown on receipts and payments account                                             | 2,729                              | -                                |                                            |                                           | 2,729                                        | 1,460                             |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           | -                                            |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           | -                                            |                                   |
|                                                                | <b>Cash and bank balances at end of year</b><br>(Agree balances with receipts and payments account(s)) | <b>3,445</b>                       | <b>18,797</b>                    | <b>-</b>                                   | <b>-</b>                                  | <b>22,242</b>                                | <b>19,513</b>                     |
|                                                                |                                                                                                        | -                                  | -                                | -                                          | -                                         | -                                            |                                   |
| <b>B2 Investments</b>                                          | Details                                                                                                |                                    |                                  | Fund to which asset belongs                |                                           | Market valuation<br>to nearest £             | Last year<br>to nearest £         |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  | Total                                      | -                                         | -                                            |                                   |
| <b>B3 Other assets</b>                                         | Details                                                                                                |                                    |                                  | Fund to which asset belongs                | Cost (if available)<br>to nearest £       | Current value (if available)<br>to nearest £ | Last year<br>to nearest £         |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  | Total                                      | -                                         | -                                            | -                                 |
| <b>B4 Liabilities</b>                                          | Details                                                                                                |                                    |                                  | Fund to which liability relates            |                                           | Amount due<br>to nearest £                   | Last year<br>to nearest £         |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  | Total                                      | -                                         | -                                            |                                   |
| <b>B5 Contingent liabilities</b>                               | Details                                                                                                |                                    |                                  | Fund to which liability relates            |                                           | Amount due (estimate)<br>to nearest £        | Last year<br>to nearest £         |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  | Total                                      | -                                         | -                                            |                                   |
| Signed by one or two trustees<br>on behalf of all the trustees | Signature                                                                                              |                                    | Print Name                       |                                            | Date of approval                          |                                              |                                   |
|                                                                |                                                                                                        |                                    |                                  |                                            |                                           |                                              |                                   |

## Rose Duncan Community Foundation

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**Additional analysis (1)**

## Analysis of receipts and payments

## 1 Donations

|              | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Expendable<br>endowment<br>funds<br>to nearest £ | Permanent<br>endowment<br>funds<br>to nearest £ | Total current<br>period<br>to nearest £ | Total last<br>period<br>to nearest £ |
|--------------|------------------------------------|----------------------------------|--------------------------------------------------|-------------------------------------------------|-----------------------------------------|--------------------------------------|
|              | -                                  |                                  |                                                  |                                                 | -                                       |                                      |
|              |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|              |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|              |                                    |                                  |                                                  |                                                 | -                                       |                                      |
| <b>Total</b> | -                                  | -                                | -                                                | -                                               | -                                       | -                                    |
|              | reference                          | -                                | -                                                | -                                               | reference                               | -                                    |

## 2 Grants

|                                    | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Total current<br>period<br>to nearest £ | Total last<br>period<br>to nearest £ |
|------------------------------------|------------------------------------|----------------------------------|-----------------------------------------|--------------------------------------|
| Fife Council                       |                                    | -                                | -                                       | -                                    |
| Fife Voluntary Action              |                                    | -                                | -                                       | 14,421                               |
| Fife Charities Trust               |                                    |                                  | -                                       | -                                    |
| Hugh Fraser Foundation             |                                    |                                  | -                                       | -                                    |
| Kingdom Housing initiative         |                                    |                                  | -                                       | -                                    |
| Russell Trust                      |                                    |                                  | -                                       | -                                    |
| North Glenrothes Community Council |                                    |                                  | -                                       | -                                    |
| Over the bridge events             |                                    |                                  | -                                       | -                                    |
| Heat to Eat                        |                                    | -                                | -                                       | 2,500                                |
| Payroll                            | -                                  |                                  |                                         |                                      |
| Brownlie Charitable trust          | -                                  |                                  |                                         |                                      |
| Stephens Bakery                    |                                    |                                  | -                                       | -                                    |
| Baynes Charity                     |                                    |                                  | -                                       | -                                    |
| Howe Rotary Club                   |                                    |                                  | -                                       | -                                    |
| Ewan McLean Limited                |                                    | -                                | -                                       | 5,000                                |
| St Andrews University              |                                    | -                                | -                                       | 1,200                                |
| Local Giving                       | -                                  |                                  | -                                       | 500                                  |
| Foundation Scotland                |                                    | -                                | -                                       | -                                    |
| Robertson Trust                    |                                    | -                                | -                                       | 1,500                                |
| Scottish Police Authority          |                                    | -                                | -                                       | -                                    |
| HSF Hospital Saturday Fund         |                                    | -                                | -                                       | -                                    |
| Sports Hub                         |                                    |                                  | -                                       | -                                    |
| Corra Foundation                   |                                    | -                                | -                                       | 3,675                                |
|                                    |                                    |                                  | -                                       |                                      |
| <b>Total</b>                       | -                                  | -                                | -                                       | 28,796                               |
|                                    |                                    |                                  | reference                               |                                      |

## 3 Gross receipts from other charitable activities

|              | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Expendable<br>endowment<br>funds<br>to nearest £ | Permanent<br>endowment<br>funds<br>to nearest £ | Total current<br>period<br>to nearest £ | Total last<br>period<br>to nearest £ |
|--------------|------------------------------------|----------------------------------|--------------------------------------------------|-------------------------------------------------|-----------------------------------------|--------------------------------------|
|              |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|              |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|              |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|              |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|              |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|              |                                    |                                  |                                                  |                                                 | -                                       |                                      |
| <b>Total</b> | -                                  | -                                | -                                                | -                                               | -                                       | -                                    |

## 4 Payments relating directly to charitable activities

|                                             | Unrestricted funds<br>to nearest £ | Restricted funds<br>to nearest £ | Expendable<br>endowment<br>funds<br>to nearest £ | Permanent<br>endowment<br>funds<br>to nearest £ | Total current<br>period<br>to nearest £ | Total last<br>period<br>to nearest £ |
|---------------------------------------------|------------------------------------|----------------------------------|--------------------------------------------------|-------------------------------------------------|-----------------------------------------|--------------------------------------|
| Expenses directly for charitable activities | 6,275                              | -                                |                                                  |                                                 | 6,275                                   | 29,309                               |
| Defibrillators                              | 1,650                              |                                  |                                                  |                                                 | 1,650                                   |                                      |
|                                             |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|                                             |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|                                             |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|                                             |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|                                             |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|                                             |                                    |                                  |                                                  |                                                 | -                                       |                                      |
|                                             |                                    |                                  |                                                  |                                                 | -                                       |                                      |
| <b>Total</b>                                | 7,925                              | -                                | -                                                | -                                               | 7,925                                   | 29,309                               |

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**Additional analysis (2)****5 Breakdown of unrestricted funds**

|                                                            | Unrestricted<br>fund 1 - enter<br>name of fund<br>below | Unrestricted<br>fund 2 - enter<br>name of fund<br>below | Unrestricted<br>fund 3 - enter<br>name of fund<br>below | Unrestricted<br>fund 4 - enter<br>name of fund<br>below | Total<br>unrestricted<br>funds | Total<br>unrestricted<br>funds last<br>period |
|------------------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------|--------------------------------|-----------------------------------------------|
| <b>Receipts</b>                                            |                                                         |                                                         |                                                         |                                                         |                                |                                               |
| Donations                                                  | 8,297                                                   |                                                         |                                                         |                                                         | 8,297                          |                                               |
| Legacies                                                   |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Grants                                                     |                                                         |                                                         |                                                         |                                                         | -                              | 1,687                                         |
| Receipts from fundraising activities                       | 2,357                                                   |                                                         |                                                         |                                                         | 2,357                          | 6,609                                         |
| Gross trading receipts                                     |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| buildings                                                  |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Rents from land & buildings                                |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Gross receipts from other charitable activities            |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| <b>Sub total</b>                                           | <b>10,654</b>                                           | -                                                       | -                                                       | -                                                       | <b>10,654</b>                  | <b>8,296</b>                                  |
| <b>Receipts from asset &amp; investment sales</b>          |                                                         |                                                         |                                                         |                                                         |                                |                                               |
| Proceeds from sale of fixed assets                         |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Proceeds from sale of investments                          |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| <b>Sub total</b>                                           | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                       | <b>-</b>                                      |
| <b>Total receipts</b>                                      | <b>10,654</b>                                           | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                                                | <b>10,654</b>                  | <b>8,296</b>                                  |
| <b>Payments</b>                                            |                                                         |                                                         |                                                         |                                                         |                                |                                               |
| Expenses for fundraising activities                        | -                                                       |                                                         |                                                         |                                                         | -                              | 5,823                                         |
| Gross trading payments                                     |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Investment management costs                                |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Payments relating directly to charitable activities        | 7,925                                                   |                                                         |                                                         |                                                         | 7,925                          | 4,210                                         |
| Grants and donations                                       |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Governance costs:                                          |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Audit / independent examination                            |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Preparation of annual accounts                             |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Legal costs                                                |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
|                                                            |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| <b>Sub total</b>                                           | <b>7,925</b>                                            | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                                                | <b>7,925</b>                   | <b>10,033</b>                                 |
| <b>Payments relating to asset and investment movements</b> |                                                         |                                                         |                                                         |                                                         |                                |                                               |
| Purchases of fixed assets                                  |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| Purchase of investments                                    |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| <b>Sub total</b>                                           | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                       | <b>-</b>                                      |
| <b>Total payments</b>                                      | <b>7,925</b>                                            | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                                                | <b>7,925</b>                   | <b>10,033</b>                                 |
| <b>Net receipts / (payments)</b>                           | <b>2,729</b>                                            | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                                                | <b>2,729</b>                   | <b>(1,737)</b>                                |
| <b>Transfers to / (from) funds</b>                         |                                                         |                                                         |                                                         |                                                         | -                              |                                               |
| <b>Surplus / (deficit) for year</b>                        | <b>2,729</b>                                            | <b>-</b>                                                | <b>-</b>                                                | <b>-</b>                                                | <b>2,729</b>                   | <b>(1,737)</b>                                |
| <b>Nature and purpose of funds</b>                         |                                                         |                                                         |                                                         |                                                         |                                |                                               |

## Rose Duncan Community Foundation

SC051381

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

|                                                            | Restricted fund<br>1 - enter name<br>of fund below | Restricted fund<br>2 - enter name<br>of fund below | Restricted fund<br>3 - enter name<br>of fund below | Restricted fund<br>4 - enter name<br>of fund below | Total restricted<br>funds | Total restricted<br>funds last<br>period |
|------------------------------------------------------------|----------------------------------------------------|----------------------------------------------------|----------------------------------------------------|----------------------------------------------------|---------------------------|------------------------------------------|
| <b>Receipts</b>                                            |                                                    |                                                    |                                                    |                                                    |                           |                                          |
| Donations                                                  |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Legacies                                                   |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Grants                                                     | -                                                  |                                                    |                                                    |                                                    | -                         | 28,296                                   |
| 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            |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| <b>Sub total</b>                                           | -                                                  | -                                                  | -                                                  | -                                                  | -                         | 28,296                                   |
| <b>Receipts from asset &amp; investment sales</b>          |                                                    |                                                    |                                                    |                                                    |                           |                                          |
| Proceeds from sale of fixed assets                         |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Proceeds from sale of investments                          |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| <b>Sub total</b>                                           | -                                                  | -                                                  | -                                                  | -                                                  | -                         | -                                        |
| <b>Total receipts</b>                                      | -                                                  | -                                                  | -                                                  | -                                                  | -                         | 28,296                                   |
| <b>Payments</b>                                            |                                                    |                                                    |                                                    |                                                    |                           |                                          |
| Expenses for fundraising activities                        |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Gross trading payments                                     |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Investment management costs                                |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Payments relating directly to charitable activities        | -                                                  |                                                    |                                                    |                                                    | -                         | 25,099                                   |
| Grants and donations                                       |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Governance costs:                                          |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Audit / independent examination                            |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Preparation of annual accounts                             |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Legal costs                                                |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| <b>Sub total</b>                                           | -                                                  | -                                                  | -                                                  | -                                                  | -                         | 25,099                                   |
| <b>Payments relating to asset and investment movements</b> |                                                    |                                                    |                                                    |                                                    |                           |                                          |
| Purchases of fixed assets                                  |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| Purchase of investments                                    |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| <b>Sub total</b>                                           | -                                                  | -                                                  | -                                                  | -                                                  | -                         | -                                        |
| <b>Total payments</b>                                      | -                                                  | -                                                  | -                                                  | -                                                  | -                         | 25,099                                   |
| <b>Net receipts / (payments)</b>                           | -                                                  | -                                                  | -                                                  | -                                                  | -                         | 3,197                                    |
| <b>Transfers to / (from) funds</b>                         |                                                    |                                                    |                                                    |                                                    | -                         |                                          |
| <b>Surplus / (deficit) for year</b>                        | -                                                  | -                                                  | -                                                  | -                                                  | -                         | 3,197                                    |

**Nature and purpose of funds**

## APPENDIX 3



|                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Independent examiner's report on the accounts |      |    |                             |                 |                                                             | v2 |
|------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|------|----|-----------------------------|-----------------|-------------------------------------------------------------|----|
| Report to the trustees/members of                    | Charity name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Rose Duncan Community Foundation              |      |    |                             |                 |                                                             |    |
|                                                      | Registered charity number                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | SC051381                                      |      |    |                             |                 |                                                             |    |
|                                                      | 01                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Period start date                             |      |    |                             | Period end date |                                                             |    |
|                                                      | Day                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Month                                         | Year |    | Day                         | Month           | Year                                                        |    |
|                                                      | 01                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 12                                            | 2023 | to | 30                          | 11              | 2024                                                        |    |
| Set out on pages                                     | 1 to 7                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                               |      |    |                             |                 | (remember to include the page numbers of additional sheets) |    |
| Respective responsibilities of trustees and examiner | <p>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.</p>                                                                                                                                                                                                                       |                                               |      |    |                             |                 |                                                             |    |
| Basis of independent examiner's statement            | <p>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.</p>                                                                                                                                                                  |                                               |      |    |                             |                 |                                                             |    |
| Independent examiner's statement                     | <p>In the course of my examination, no matter has come to my attention [other than that disclosed on the attached page*]</p> <ol style="list-style-type: none"> <li>which gives me reasonable cause to believe that in any material respect the requirements: <ul style="list-style-type: none"> <li>to keep accounting records in accordance with section 44(1) (a) of the 2005 Act and Regulation 4 of the 2006 Accounts Regulations, and</li> <li>to prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 Accounts Regulations</li> </ul> </li> </ol> <p>have not been met, or</p> <ol style="list-style-type: none"> <li>to which, in my opinion, attention should be drawn in order to enable a proper</li> </ol> |                                               |      |    |                             |                 |                                                             |    |
| Signe                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                               |      |    | 16 <sup>th</sup> April 2025 |                 |                                                             |    |
| Nam                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                               |      |    |                             |                 |                                                             |    |
| Relevant profession                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                               |      |    |                             |                 |                                                             |    |
| qualification(s) or bo                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                               |      |    |                             |                 |                                                             |    |
| (if an                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                               |      |    |                             |                 |                                                             |    |
| 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