



Annual Report and Financial Statement

Period ending 28th February 2026

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Trustees' Annual Report – Period ending 28th February 2026

The Trustees have pleasure in presenting this report together with the Financial Statement and the independent examiner's report for the period ending 28th February 2026.

Reference and Administrative Information

Charity Name	BERTIE BUS
Scottish Charity Number	SC052102
Address	4 Laurel Avenue, Crieff PH7 3EN treasurer@bertiebus.org.uk ☎ 07745393132

Current Trustees

Ian Aikman	Chair & Bus Convenor	Appointed	31 st October 2022
Ingrid Clayden		Appointed	31 st October 2022
Winnie Jamieson		Appointed	19 th January 2026
Kim MacKinnon		Appointed	31 st October 2022
Sue Maclean		Appointed	31 st October 2022
Fred Mason	Treasurer	Appointed	31 st October 2022
Christopher McDermott	Secretary	Appointed	18 th March 2024
Margaret McPhater		Appointed	31 st October 2022
Margaret Morrison		Appointed	31 st October 2022
Louise Pengelley		Appointed	31 st October 2022
Sally Stewart	Vice Chair	Appointed	31 st October 2022

The following also served as Trustees during the financial year.

John Bray	Resigned 13 th October 2025
Kathleen Coffey	Resigned 19 th January 2026
Alastair Petrie	Resigned 6 th May 2025

Structure, Governance and Management

Constitution

Bertie Bus was registered as a Scottish Charitable Incorporated Organisation (SCIO) on 31st October 2022 and the purpose and administrative arrangements are set out in the constitution. Bertie Bus has no relationship with any other body. The charity which was previously known as Strathcare was formed in 1975, Strathcare was granted charitable status by the Scottish Charity Regulator (OSCR) in 1990 as an unincorporated Registered Scottish Charity.

Appointment of Trustees

Trustees are appointed or reappointed by the members at the Annual General Meeting, which is held within six weeks of the end of the financial year. The Board of Trustees may at any time appoint any person to be a charity Trustee.

Management

The Board, including the Bus Convenor and Club Leaders, meet regularly and set the strategy and policy of the SCIO, generally control and supervise the activities of the SCIO and, in particular, are responsible for monitoring its financial position and are responsible also for the day-to-day management of the SCIO.

Objectives and Activities

Charitable Purposes

Bertie Bus is an organisation which works to enhance the quality of life of those in Crieff and district who are elderly, isolated or disabled in any way, through the provision of suitable transport to a range of clubs and activities, thus providing friendship, a sense of community and purpose.

Activities

Through active fund raising, support from the local community, donations from Bertie Bus clubs and other users and grants Bertie Bus owns, maintains and operates a specially adapted minibus suitable for wheelchair use. Bertie Bus recruits and trains volunteer drivers and passenger assistants, who are issued with updated guidelines and protocols. Bertie Bus holds full motor, public liability and Trustees Indemnity insurance. Bertie Bus also holds and operates within the constraints of a Section 19 Permit.

The weekly clubs are autonomous, but Bertie Bus has an overview of the opportunities and variety on offer through regular contact with the weekly Wednesday Club, Thursday Lunch Club (run by the RVS) the Friday Club as well as the internally run twice monthly Comrie Club and monthly, Cinema Club, Library group, Tea Dance run and M&S Shopping Trip. Bertie Bus also offers transport to many other local organisations, serving adults in a range of age groups with mobility or isolation

challenges and several local Residential Homes. Publicity is by word of mouth, a website, local newspapers, a dedicated brochure and fund-raising activities.

Achievement and Performance

This year has been another very successful one for Bertie Bus. The past year was the charity's 50th anniversary. To advertise this milestone, we had some new graphics for Bertie including a large 50th anniversary roundel on the bonnet and new writing done in gold. Back in 1975, we started life supporting the lunch club once a week and we have grown a lot since then. In 1979 funds were raised to purchase our first adapted Bus; Bertie 1. Since then we have replaced the bus a number of times, we are now on Bertie 5.

Our regular runs include: Comrie and Library clubs, Muthill group, Tuesday shopping trip, the Wednesday and Friday clubs, Richmond house runs, Dalnaglar trips, the lunch club, and the Cinema club. All of these were up and running by the end of March last year bringing much pleasure to our passengers.

The Sunday Tea dances, organised and run by Strathearn Arts, were so popular that passenger numbers exceeded Bertie Bus's capacity. Happily, some of our very kind volunteers helped by using their own vehicles to transport passengers so that no one missed out. This year we have supported Strathearn Arts Warm Wednesdays taking passengers to the event so they can enjoy free soup, sandwiches and a movie.

In February last year we were invited again to take passengers to the dress rehearsal of The Scottish Fiddle Orchestra at Perth Concert Hall. This proved to be a fantastic afternoon enjoyed by passengers and volunteers alike and we're delighted to have been invited again this year.

On the 20th of July 2025, we organised a 50th Birthday celebration summer lunch, held at the Royal British Legion on Perth Road, whom we would like to thank for the use of their facilities. The event was attended by over 80 passengers and residents of Crieff and Strathearn who were taken to and from the lunch not only by Bertie but also by Sweeny's buses and the Coco bus from Comrie. Some of our kind volunteers also helped, by using their own transport to bring passengers from Crieff and surrounding areas. We dressed the room with 50th celebration balloons, napkins and other table decorations. Campbell's bakery put on a great spread which was served along with tea, coffee and a glass of wine to toast the 50 years. The 50th Birthday cake kindly donated by Campbells Bakery took pride of place. Around 15 of our volunteers helped on the day serving food and drinks, and of course doing the washing up. It goes without saying that a great time was had by all.

On the 22nd of August we held a celebration dinner and ceilidh, to which we invited all our current volunteers and as many past volunteers that we could. The event was held in the grounds of Broich House, a beautiful marquee was decorated and dressed for the evening. Each attendee received their own copy of a booklet full of photos and illustrations by local artist Pedro. This history of Strathcare/Bertie Bus was created by Fred Mason and Anne Orchardson. Our guest speaker was Rory Stewart - many thanks go to Rory for giving up his time to support us. We had a lovely meal, complimentary wine and a ceilidh band who provided the music. I think all will agree it was a great night. There was lots of chatting, laughing, and catching up with volunteers past and present. Great thanks go to Sally Stewart for allowing us to use the marquee the night before her birthday party, and to the anonymous supporters of Bertie Bus who donated funds to be spent specifically on this very special event.

We organised Driver refresher training on the 31st July and the 14th August covering basic pre drive checks, topping up fluid levels and using our specialist equipment to be able to carry passengers in wheel chairs. A valuable reminder for all who attended.

Midas training by Perth and Kinross Council was organised for all our new drivers, and those existing drivers whose tests were due.

Our website Bertie Bus.org.uk has been refreshed and improved.

We serve many individuals in and around Crieff, providing safe door-to-door transport, friendly volunteers, and a change of scenery that offers a welcome highlight to their week. Those in nursing or care homes also enjoy outings. Library users unable to use public transport also appreciate the service provided.

Demand for our services has been high over the past year. The Wednesday, Friday, Marks & Spencer, Comrie, and Tea Dance groups often run at full capacity. Only the Thursday lunch run is low on numbers and efforts are being made to increase passengers for this run. We get new passengers mainly via word-of-mouth, but also through the Social Prescriber. As Bertie goes around Crieff the bus is our best advertisement.

Over the last 12 months, Bertie Bus has covered 7228 miles on 224 outings carrying the equivalent of 1718 passengers, supported by the equivalent of 459 Passenger Assistants. These figures are all up on last year, which puts into context how much we do for the local community.

Bertie Bus was featured in J L Gills window on Crieff High Street for the month of August 2025. The display included our first minute book, photos from over the years and information about what we do, a big thank you to the staff for dressing the window featuring Bertie bus.

More crucially perhaps, Bertie Bus positively offers information meetings with front-line health and care professionals and in lots of cases is the go-to for elderly and isolated people within Crieff and Strathearn.

The office bearers regularly receive calls from family members and care professionals regarding current and potential service users. Office bearers offer support and additional information wherever possible. Our relationship with the local Social Prescriber has continued to increase the number of people we can assist.

Our groups and transport already support a considerable number of passengers who demonstrate memory or functional limitations. Much credit is due to the passenger assistants and drivers who ensure their safety and enjoyment.

Bertie Bus currently has sixteen volunteer drivers and thirty-two volunteer passenger assistants who give freely of their time and services. All volunteers are offered training as appropriate.

In news relating to the organisational structure of Bertie Bus, John Bray, Alastair Petrie and Kathleen Coffey have decided this year to step away as trustees however John has committed to continue with all our publicity, Alastair is continuing to look after the library club and Kathleen is continuing as volunteer coordinator. Their contribution and hard work have been much appreciated over the last few years. I am pleased to announce that Winnie Jamison has agreed to take over the Wednesday club and has also come on board as a trustee, those that know Winnie I think will agree that she will be great asset to the committee.

I would like to thank all our volunteers for all their hard work and support over the last twelve months. It is very much appreciated; we could not operate without these amazing people.

Financial Review

General

Bertie Bus's income is derived from donations, both from clubs and bus users as a contribution towards running costs, also from outside organisations / individuals as a gesture of goodwill, legacies, fundraising, grants and interest. This year Bertie Bus received donations from Building Bridges, Crieff Friday Club, Crieff Golf Club Ladies' Section, Crieff Round Table, Duchlage Court, Gift Aid, Lodge St Michael and nineteen individuals.

During the year grants have been secured from Transport Scotland (NSG), and P&KC Community Transport Fund.

All grants and donations are considered as unrestricted and are treated in accordance with the regulatory guidelines issued by The Scottish Charity Regulator.

Total receipts for the year were **£24,140.24** (last year £22,712.59) and payments totalled **£18,149.50** (last year £10,189.84) thus giving a surplus of **£5,990.74** (last year **£12,522.74**). Depreciation on the Mercedes bus LX67 BWY (Bertie 5) which was purchased by Strathcare in Feb 2018 at a cost of **£70,187** and subsequently transferred to Bertie Bus is assumed to be 25% per annum and is therefore now valued at **£7,027** (last year **£9,368**). Bertie Bus is extremely grateful for the provision of premises and parking by Richmond House, the hosting of Board meeting (with refreshments) by our Vice Chair and all the volunteer drivers, passenger assistants and Trustees for their time and commitment to the charity's aim.

Reserve Policy

Bertie Bus has a policy of ensuring that there are always sufficient unrestricted funds retained in easy access or short-term accounts to cover running costs, and the virtually immediate replacement of the bus should this prove necessary.

Future Plans

The Trustees intend to continue to develop services to the people in the area, recognizing the benefit to those in the community who might otherwise feel lonely and isolated and to draw them back into society. The Trustees also intend to ensure that all drivers and passenger assistants continue to be offered relevant training, and that contact is initiated and maintained with those who can help further our objectives.

Approved by the Trustees on 2nd March 2026 and signed on their behalf by



Ian Aikman
Chair

Independent Examiner's Report for the Year ended 28th February 2026

Independent Examiner's Report for the Trustees of Bertie Bus.

I report on the financial statements of the charity for the year ending 28th February 2026, which are set out on pages 6 to 10.

Respective Responsibilities of Trustees and Examiner

The charity's Trustees are responsible for the preparation of the accounts in accordance with the terms of the Charities and Trustee Investment (Scotland) Act 2005 ("The 2005 Act") and the Charities Accounts (Scotland) Regulations 2006 (as amended) ("The 2006 Regulations"). The charity's Trustees consider that the audit requirement of Regulation 10 (1) (b) of the 2006 Regulations does not apply. It is my responsibility to examine the accounts as required under section 44 (1) (c) of the 2005 Act and to state whether matters have come to my attention.

Basis of Independent Examiner's Statement

My examination is carried out in accordance with Regulation 11 of the 2006 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 such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently I do not express an audit opinion on the accounts.

Independent Examiner's Statement

In connection with my examination, no matter has come to my attention: -

1. Which gives me reasonable cause to believe that, in any material respect, the requirements: -
 - To keep accounting records in accordance with section 44 (1) (a) of the 2005 Act and regulation 4 of the 2006 Regulations, and
 - To prepare accounts which accord with the accounting records and comply with regulation 9 of the 2006 Regulations have not been met, or
2. To which in my opinion, attention should be drawn to enable a proper understanding of the accounts to be reached.

Lindsay Wilkinson

11 Turretbank Drive, Crieff, Perthshire, PH7 4LW.

Signed  9/3/26

Date 9th March 2026

Statement of Receipts and Payments

for the period 1st March 2025 to 28th February 2026

Receipts	Notes	Unrestricted Fund	Restricted Fund	Total this Year	Total last Year
Voluntary Receipts					
Donations		9,636	0	9,636	7,296
Legacies		225	0	225	0
Grants	4	3,681	0	3,681	5,608
Fund-Raising		2,298	0	2,298	1,930
Gross Trading		0	0	0	0
Bank & Building Society Interest		4,618	0	4,618	4,477
Receipts for Charitable Activities					
Bus Users Contributions		3,682	0	3,682	3,402
Total Receipts		24,140	0	24,140	22,713
Payments					
Cost of Fund-Raising		977	0	977	0
Cost of Charitable Activities	5	16,847	0	16,847	10,112
Governance Costs	6	96	0	96	78
Purchase of Assets		229	0	229	0
Total Payment		18,150	0	18,150	10,190
Surplus/Deficit for the year		5,991	0	5,991	12,523

The notes on pages 8 and 9 form an integral part of these accounts.

Funds Reconciliation	Unrestricted Fund	Restricted Fund	Current Year	Previous Year
Cash at Bank and in Hand - 28/02/2025	148,273	0	148,273	135,750
Surplus/ Deficit for the year	5,991	0	5,991	12,523
Cash at Bank and in Hand - 28/02/2026	154,264	0	154,264	148,273

Statement of Balances - As at 28th February 2026

Cash	68	0	68	59
BOS Treasurers Account	7,021	0	7,021	13,005
BOS 32 Day Notice Account	0	0	0	52,190
United Trust Bank (Aug 2027)	66,184	0	66,184	63,020
United Trust Bank (Jun 2026)	20,992	0	20,992	20,000
Redwood Bank	60,000	0	60,000	0
Total	154,264	0	154,264	148,273

Other Assets (Unrestricted Fund)

Mercedes Sprinter Bus (Bertie 5, Purchased Feb 2018 - £70,187)	7,027	9,369
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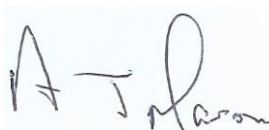
Of the unrestricted fund £80,000 is designated as Bertie Bus Replacement Fund.

The notes on pages 8 and 9 form an integral part of these accounts.

Approved by the Trustees of Bertie Bus at a meeting on 2nd March 2026 and signed on their behalf.



Ian Aikman
Chair



Fred Mason
Treasurer

Notes to the Accounts - for the Year Ended 28th February 2026

1 Basis of Accounting

These accounts have been prepared on the Receipts and Payment basis in accordance with the Charities & Trustees Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations (as amended).

2 Nature and Purpose of Funds

Unrestricted Funds are those that may be used at the discretion of the trustees in furtherance of the objects of the charity.

3 Related Party Transactions

Bertie Bus purchases Trustee indemnity insurance for all its trustees and reimburses any documented expenses.

No other remuneration was paid to any trustee or to any connected persons during the year.

	Unrestricted Fund	Restricted Fund	Current Year	Previous Year
4 Grants Received				
PK&C HSCP Fund	0	0	0	500
P&KC Community Transport Fund	1,983	0	1,983	900
Scottish Government NSG	1,698	0	1,698	987
P&KC Community Investment Fund	0	0	0	0
	3,681	0	3,681	2,387

5 Cost of Charitable Activities

	2,779	0	2,779	1,876
Bus Repairs, Maintenance & MOT	3,794	0	3,794	974
Coffee Morning	0	0	0	400
Vehicle & Trustee Insurance	1,097	0	1,097	2,428
Cinema Tickets	149	0	149	163
Presentations & Social	4,575	0	4,575	130
Training	964	0	964	894
Consumables	161	0	161	94
Publicity & Stationary	1,995	0	1,995	47
Summer Lunch	872	0	872	0
Volunteers Tea	0	0	0	341
Bus Hire	78	0	78	0
Driver's Licence and Check	384	0	384	0
	16,847	0	16,847	7,347

6 Governance Cost

	Unrestricted	Restricted	Current Year	Previous Year
Trustees Meeting	30	0	30	0
Annual General Meeting	30	0	30	30
Independent Examiner	30	0	30	48
Bank Fees	5	0	5	0
	96	0	96	78