

**MONTROSE BEFRIENDING SERVICE**

**ACCOUNTS FOR**

**Year to 31 march 2025**

**SCOTTISH CHARITY NO. SC052396**

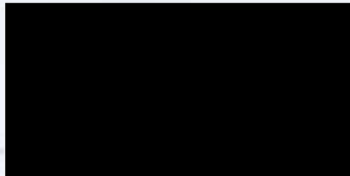
**MONTROSE BEFRIENDING SERVICE**

**TRUSTEES ANNUAL REPORT  
YEAR ENDED 31 MARCH 2025**

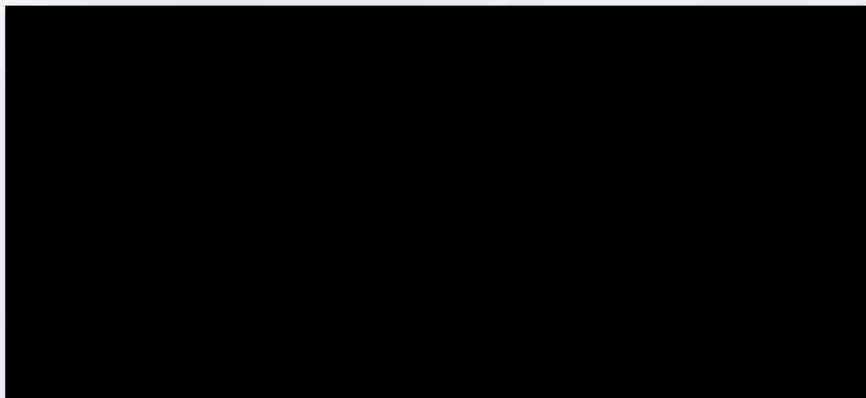
**Charity Name:** Montrose Befriending Service

**Charity Reg No.** SC052396

**Contact Address:**



**Trustees**



**Management Committee**

**Independent Examiner**

DD10 9JS

**Bankers:**

Virgin Money  
7 Gold Street  
NORTHAMPTON  
NN1 1EN

**MONTROSE BEFRIENDING SERVICE**  
**TRUSTEES ANNUAL REPORT**  
**FOR THE YEAR ENDED 31ST MARCH 2025**

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

The Charity was registered on 13 March, 2023 and began operating a befriending service with effect from 30 May, 2023.

**OBJECTIVES**

The objective of the charity is to provide community contact with adults, living in the Montrose area, identified as in need of befriending support on a flexible timescale relevant to individual requirements, to support their social activities without distinction of political, religious and other opinions, to help improve their well being, and thus empower them to be participants in their community according to each individual's abilities and wishes.

**ACTIVITIES AND ACHIEVEMENTS**

Montrose Befriending Service aim is to reach to the isolated and lonely in our community. We do this through face-to-face befriending and through group activities.

It has been a busy year for us with numbers of befrienders growing, and groups starting up. In short, more isolated people within our community being reached.

We have had three intakes of new volunteer befrienders for our face-to-face service which usually takes place once per week, with visits or outings. We also welcomed a new part-time member of staff, a schools co-ordinator, who is working with our third intake of volunteers, 8th year pupils from Montrose Academy, who visit residents at Ford Mill Care Home on a Monday and Friday afternoon. The pupils are enjoying providing meaningful companionship with the residents in a variety of ways; chatting, taking part in activities, singing together etc. This is not only expanding our young befrienders' social skills and interactivities with a different generation, and the residents look forward to these visits.

During the year we have enjoyed several group activities, a picnic in August, a lively Christmas party, a trip to the pantomime and to the coffee mornings.

We also run a games group on a Monday evening with participants ranging from their 20's to 80's! A Tea and Toast group runs on alternate Mondays at Provost Johnson complex. The group has added to the tenant's monthly planner and is a very relaxed group with everyone helping and chatting away.

A Monday craft group was started in April, 2024, led by volunteer crafters, and have tried various new skills, sharing a cuppie in a relaxed atmosphere.

**STATEMENT OF TRUSTEES' RESPONSIBILITIES**

The Trustees must prepare financial statements which give sufficient detail to enable an appreciation of the transactions of the Trust during the financial year. The Trustees are responsible for keeping proper accounting records which, on request, must reflect the financial position of the Trust at that time. This must be done to ensure that the financial statements comply with the Charities and Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). They are also responsible for safeguarding the assets of the Trust and must take reasonable steps for the prevention and/or detection of fraud and other irregularities.

**APPROVED BY THE TRUSTEES AND SIGNED ON THEIR BEHALF:**

.....  
.....Chairman

Date: 24/7/2025

**MONTROSE BEFRIENDING SERVICE**  
**RECEIPTS AND PAYMENTS ACCOUNT**  
**FOR THE YEAR TO 31 MARCH 2025**

	Restricted £	Unrestricted £	Total £
<b>INCOME</b>			
Lottery Grant Funding	36,000		36,000
Donations	5,800	3,220	9,020
Fundraising Events		2,211	2,211
<b>Total Income</b>	<u>41,800</u>	<u>5,431</u>	<u>47,231</u>
<b>EXPENDITURE</b>			
Salaries and Pension Costs	38,932		38,932
Volunteers Expenses	2,276		2,276
Craft Club - Hall. Materials etc		809	809
Refreshments, Board Games etc		416	416
Rent of Braoch Room		1,120	1,120
Other Rents		460	460
Rent of Halls for Coffee Mornings		170	170
Stationery etc		661	661
Insurance		358	358
Subscriptions		75	75
Speakers		40	40
Course Fees/Training Expenses		158	158
Fundraising Expenses		170	170
Banner and Handbook		255	255
Volunteers Lunch		302	302
<b>Total Expenditure</b>	<u>41,208</u>	<u>4,994</u>	<u>46,202</u>
<b>Net Surplus transferred to Reserves.</b>	<u>592</u>	<u>437</u>	<u>1,029</u>

**MONTROSE BEFRIENDING SERVICE**  
**RECEIPTS AND PAYMENTS ACCOUNT**  
**FOR THE YEAR TO 31 MARCH 2025**

	Restricted £	Unrestricted £	Total £
<b>INCOME</b>			
Lottery Grant Funding	36,000		36,000
Donations	5,800	3,220	9,020
Fundraising Events		2,211	2,211
<b>Total Income</b>	<u>41,800</u>	<u>5,431</u>	<u>47,231</u>
<b>EXPENDITURE</b>			
Salaries and Pension Costs	38,932		38,932
Volunteers Expenses	2,276		2,276
Craft Club - Hall. Materials etc		809	809
Refreshments, Board Games etc		416	416
Rent of Braoch Room		1,120	1,120
Other Rents		460	460
Rent of Halls for Coffee Mornings		170	170
Stationery etc		661	661
Insurance		358	358
Subscriptions		75	75
Speakers		40	40
Course Fees/Training Expenses		158	158
Fundraising Expenses		170	170
Banner and Handbook		255	255
Volunteers Lunch		302	302
<b>Total Expenditure</b>	<u>41,208</u>	<u>4,994</u>	<u>46,202</u>
<b>Net Surplus transferred to Reserves.</b>	<u>592</u>	<u>437</u>	<u>1,029</u>

MONTROSE BEFRIENDING SERVICE

STATEMENT OF BALANCES

AT 31 MARCH 2025

	Note	Total 2025 £
Bank & Deposit Balances Brought Forward		37,923
Movements in year		
Net Surplus for the Period		<u>1029</u>
Bank Balances carried forward	1	<u><u>38,952</u></u>

**Note 1** . This represents the Restricted portion of funds - £36,000.

MONTROSE: Signed on behalf of the Trustees

24/7/2023

Chairman





## INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF MONTROSE BEFRIENDING SERVICE

I report on the Accounts of the charity for the YEAR ended 31 March 2025.  
which are set out on pages 4 to 5.

### 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 and the Charities Accounts (Scotland) Regulations 2006 (as amended).

The charity's Trustees consider that the audit requirement of Regulation 10(1) (d) of the Accounts Regulations does not apply. It is my responsibility to examine the accounts as required under section 44(1) (c) of the Act and to state whether particular matters have come to my attention.

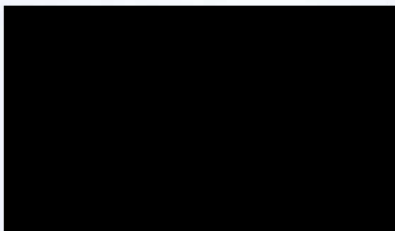
### Basis of Independent Examiner's Statement

My examination is carried out in accordance with Regulation 11 of the Charities Accounts (Scotland) Regulations 2006 (as amended). An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the Accounts, and seeks explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently, I do not express an audit opinion on the view given by the accounts.

### Independent Examiner's Statement

In the course of my examination, no matter has come to my attention

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



Date: 28/7/2025