

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	7	Feb	2024	To	30	Oct	2024

Reference and administration details

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

Forfar Old People's Hall SCIO
SC053112

Names of the charity trustees on date of approval of Trustees' Annual Report

Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			

## Reference and administration details

Names of all other charity trustees during the period, if any, (for example, those who resigned part way through the financial period)

Name	Dates acted if not for whole year

## Structure, governance and management

### Type of governing document

The hall was established by Deed of Trust in 1965, to which have been added, a number of supplementary deeds, the most recent dated June 1998.

The Trust has made an application to OSCR to transfer Forfar Old People's Hall to a SCIO (Scottish Charitable Incorporated Organisation).

The SCIO application has been successful and Forfar Old People's Hall SCIO, SC053112 was registered from 8<sup>th</sup> February 2024.

### Trustee recruitment and appointment

Trustees are appointed from a range of community groups to ensure a wide spread of community groups.

## Objectives and activities

### Charitable purposes

The objects of the Trustees being to provide a community hall for the old people of the community of Forfar and environs.

The objective of both the trustees and the management committee is to ensure that the hall remains in good condition and is accessible for community groups of all ages. Given the level of usage it is felt that the aims of the original trustees are being met in an effective manner.

### Summary of the main activities in relation to these objects

The hall is managed by a Trustees Committee, which oversees the maintenance of the property to ensure it meets acceptable standards. This committee depends on contributions from the public, generally in the form of legacies. Money is invested to provide a fund for the maintenance of the property together with improvement works.

A Management Committee handles the day to day running of the hall and employs a caretaker who deals with the users and carries out cleaning duties.

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Achievements and performance

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

The Trustees welcome donations, usually from local sources, to ensure the financial future viability of the Hall.

The Trust had agreed to transfer all of the assets to the SCIO and the first accounts prepared for the SCIO, will be merged accounts which will include any transactions from the Trust to the date of transfer to the SCIO.

However, there has been a delay in the transfer of the assets, due to administrative issues with the opening of a new bank account in the SCIO's name. Also, a tax reference for the SCIO has been applied for from HMRC and has not yet been issued. The tax reference is required for the Stockbrokers to be able to transfer the Shareholdings and the Trust's bank account is to remain open in the meantime.

As a result, there have been no transactions for the SCIO in the period to 30 October 2024. Please refer to the Accounts and Annual return in the name of the Forfar Old People's Hall – SC020405, for the movement during the period.

Financial review

Brief statement of the charity's policy on reserves

Details of any deficit

Donated facilities and services (if any)

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### 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

Chair

21<sup>st</sup> May 2025