



## **First Annual Report & Financial Statements**

**for year ended 31 March 2021**

Scottish Charitable Incorporated Organisation (SCIO) reg no SC050365

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# Trustees' Annual Report

The Trustees have pleasure in presenting their first annual report, together with the financial statements and the independent examiner's report for the year ended 31 March 2021.

## A special mention

Before we start, we take this opportunity to give a very special mention and thank you to Fife Council's Communities team who have provided us with much appreciated start-up funding and who continue to give us valued support and guidance when needed.

## Trustees

Mary Farrell, Chair

Ross Spalding, Treasurer

Nancy Rhouma, Secretary

Ben Cochrane (*resigned 21 August 2020*)

Karen Delaney

Helen Doig

Rosie Gibson

Shona Reppe

## Information

Charity name: Inverkeithing Trust

Charity number: SC050365

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Facebook: [www.facebook.com/inverkeithingtrust](https://www.facebook.com/inverkeithingtrust)

## Structure, Governance & Management

### Structure

Inverkeithing Trust is a Scottish Charitable Incorporated Organisation (SCIO) reg no SC050365. We are governed by our constitution (adopted July 2020). The Trust was granted charitable status by the Office of the Scottish Charity Regulator (OSCR) on 31 July 2020.

### Governance

The Trust is governed by its constitution (adopted July 2020).

Membership of the Trust is free and is open to anyone aged 16 years or over who lives in Inverkeithing. At 31 March 2021, the Trust had 39 members.

The Trust board members are the charity's trustees.

Any Trust member is eligible to become a trustee if they support and wish to help achieve the purposes of the organisation.

Trustees are elected at the Annual General Meeting, which is normally held in October. Under the constitution, there must be a minimum of four and not more than 12 trustees.

### Management

Trustees meet on a regular basis. They must always act in the interests of the charity and do their best to achieve the charity's purposes and objectives. They are responsible for the direction and management of the organisation.

The Trust has relevant policies in place and holds comprehensive public liability insurance.

## Charitable purposes and aims

Inverkeithing Trust is established for charitable purposes only. We aim to:

- 1) advance citizenship, community development and volunteering within and for the benefit of the community defined by the Inverkeithing Community Council area by delivering a diverse variety of services and initiatives without distinction of sex, sexuality, political, religious or other opinion, with the object of improving their conditions of life;
- 2) improve the mental and physical health and well-being of all the inhabitants of the Inverkeithing Community Council area by facilitating non-clinical, community led activity from various sites across the community of Inverkeithing;

- 3) advance education and learning by providing workshops, training sessions and courses in the community of Inverkeithing;
- 4) advance the culture, art and heritage of Inverkeithing through a variety of initiatives;
- 5) advance environmental protection or improvement through a variety of initiatives, including re-purposing vacant and derelict land into accessible and productive green space, to benefit all the inhabitants of the Inverkeithing Community Council area;
- 6) provide recreational facilities and organise recreational activities to improve the conditions of life of all the inhabitants of the Inverkeithing Community Council area.

## What have we been doing?

### In the beginning

Before becoming a charity in July 2020, Inverkeithing Trust was a constituted group called Inverkeithing Community Development Group ('ICDG') that came together following the town-wide Charrette in 2018. The outcome of the Charrette was the masterplan produced by the consultants, Aecom, entitled '*Imagine Inverkeithing*'. (A copy of the masterplan is available for reference in Maker, High Street).

Fife Council then undertook further consultations on the masterplan with community groups, which resulted in the Inverkeithing Neighbourhood Plan.

ICDG held its first formal committee meeting in January 2019 and agreed on five projects, several of which linked in with the aims of the Neighbourhood Plan. The projects were:

- the old Primary School site;
- the neglected path behind the old papermill;
- a community noticeboard;
- the Friary Gardens play park;
- Whinnyhill 'wilding' proposal;

and a brief summary of the first two projects listed is given below.

### Old Primary School site

This project took up a huge amount of ICDG time throughout 2019! We got stage 1 grant funding from the Scottish Land Fund (SLF) for a feasibility study to produce a business plan and landscaping proposals for the playground area. We were working in partnership with the Vivarium Trust who wanted to restore the main building on the site for over 50s cohousing.

ICDG wanted to landscape and develop the playground area for community use and transform the older 1874 building on the site into a 'community shed', studio space, entertainment and café area.

Unfortunately, Vivarium were not able to realise funding for the cohousing and, along with the outcome of our feasibility study, th meant the project was unviable. ICDG could not therefore progress a stage 2 funding application to SLF to purchase the playground area.

The risks involved because of the fire-damaged and unsafe buildings made this impossible.



The latest planning application by the site owners for private housing was turned down again in March 2021 – so we haven't given up hope just yet of a good outcome for this important site.

### **Neglected path behind the old papermill**

In April 2019, the Trust invited Paths for All to assess the overgrown, narrow path running alongside the railway line behind the old papermill site and to prepare a technical appraisal/cost analysis to upgrade the path to make the route more accessible to a broader range of path users where possible. Meantime, Inverkeithing Community Council arranged for Amey volunteers to cut back vegetation, widen the path and make it safer for walkers and cyclists. The Paths for All report was produced in June 2019 and is part of the Trust's current wider project to improve the coastal path.

The other three projects listed are ongoing and an update is given in the next section.

Trustees also participated in various working groups such as the town centre regeneration (Public Realm works) and the Town House refurbishment steering group.

## Where are we now?

Since becoming a charity last year, and like the rest of the country, the Trust's activities to end March 2021 have been very much affected by Covid-19 and the related restrictions in place during this time.

Despite the pandemic and the practical limitations on our time and resources, trustees and member volunteers were able to make some progress on our projects and a summary on each project is given below.

### Coastal path improvements

The Trust aims to work with local volunteers and partners to improve the quality of the Fife Coastal Path network within the Inverkeithing Community Council boundary. To support this work, the Fife Council's Local Development Officer and the Trust have been instrumental in establishing a forum of like-minded community groups in North Queensferry, Dalgety Bay and Aberdour – with a view to taking a 'joined up' approach to improvement of the coastal path. For example, we hope to take forward a joint project with the forum and Fife Council's Communities team to improve signposting and storytelling along the path between our four communities, highlighting heritage, historical and industrial aspects as well as local stories.



In addition, the Trust has invited tenders for a feasibility study to explore options for coastal path access improvements for the community, walkers, cyclists and everyone using the path.

The aim is to support healthier lifestyles, encourage visitors, reduce car use, with a consequent reduction in harmful emissions, and to provide a delivery plan for how all that can be achieved. The study will be subject to grant funding being realised and applications will be made later in the year. If successful, it's hoped the study can begin early next year.

### Community noticeboard

Thank you to Gordon Martin, Trust member, who built and erected the temporary noticeboard at the bottom of Hill Street, on the Post Office corner.

This is a community space where local groups, organisations and residents can post information about any upcoming events or activities, or share information about things that are important for our community.



Our Trust organised the noticeboard to help ‘join the information dots’ for Inverkeithing and we hope it will become a great place to find out what’s going on in the community.

‘How to use the board’ information can be found on our Facebook page and website: [www.facebook.com/inverkeithingtrust](http://www.facebook.com/inverkeithingtrust) and [www.inverkeithingtrust.co.uk](http://www.inverkeithingtrust.co.uk)

### Friary Gardens and play park

It’s hoped the regeneration of this derelict, neglected play park in the Friary Gardens can begin soon. The Trust will be working with Fife Council, Fife Historic Buildings Trust and the community to ensure the new park links in with the heritage and history of the site.

Linked to the above project, the Trust also received a grant from the Scottish Land Fund (unspent monies from the old Primary School project) for a survey of the Friary Gardens’ historic walls and vaults as there was some evidence of ground movement. The survey report will be passed to Fife Council for their use.

### Garden competition

The Trust will be resurrecting the popular Inverkeithing garden competition over the summer this year – details and entry forms will be circulated.

### Invergreening

Fife Council’s grasslands improvement plans for Whinnyhill supersede the Trust’s original ‘wilding’ project to improve biodiversity in that area. We were invited to take part in discussions about the Council’s proposals and contact is awaited. It’s hoped that Trust member volunteers and other local groups, such as the Scouts, can be involved in any planting etc.

### The Pantry

The Trust’s community Pantry runs every Thursday from 10 to 12 at the Ballast Bank centre in Preston Crescent and is open to all Inverkeithing residents.

The Trust took over the management and running from Fife Council in August last year, but the project is still well supported by the Council. Demand has been steady at between 50 to 80 customers every week.

The Pantry is part of the FareShare Scotland scheme that aims to reduce supermarket food waste by redistributing surplus to foodbanks and pantries like ours.

We pay for the FareShare produce and other items we provide such as toiletries and cleaning products, as well as additional chilled or frozen food we might have to buy to supplement FareShare deliveries.



We also receive donations of surplus food from other local supermarkets, mainly bakery and vegetables.

Pantry bags are sold at £3 each or a donation - very much less than the value of the food and products they contain.

The Pantry depends on grants, donations and volunteers to keep it going and, so far, we've been fortunate with grants from Fife Council, The Robertson Trust, Scotmid and Asda. But we're always checking out new grant sources to ensure we remain viable. Through this report, we'd like to express our grateful thanks to our Pantry volunteers, Fife Council staff, FareShare Scotland, Tesco Fire Station in Dunfermline and Dalgety Bay Co-op for their amazing support.

A huge thank you also goes to Eats Rosyth, a community charity group who provide us with 40 ready meals every week in return for our Trust supplying the containers.

And last – but definitely not least – thank you to all of our customers as the Pantry would certainly not be able to keep going without you.

### **Prestonhill and Quarry**

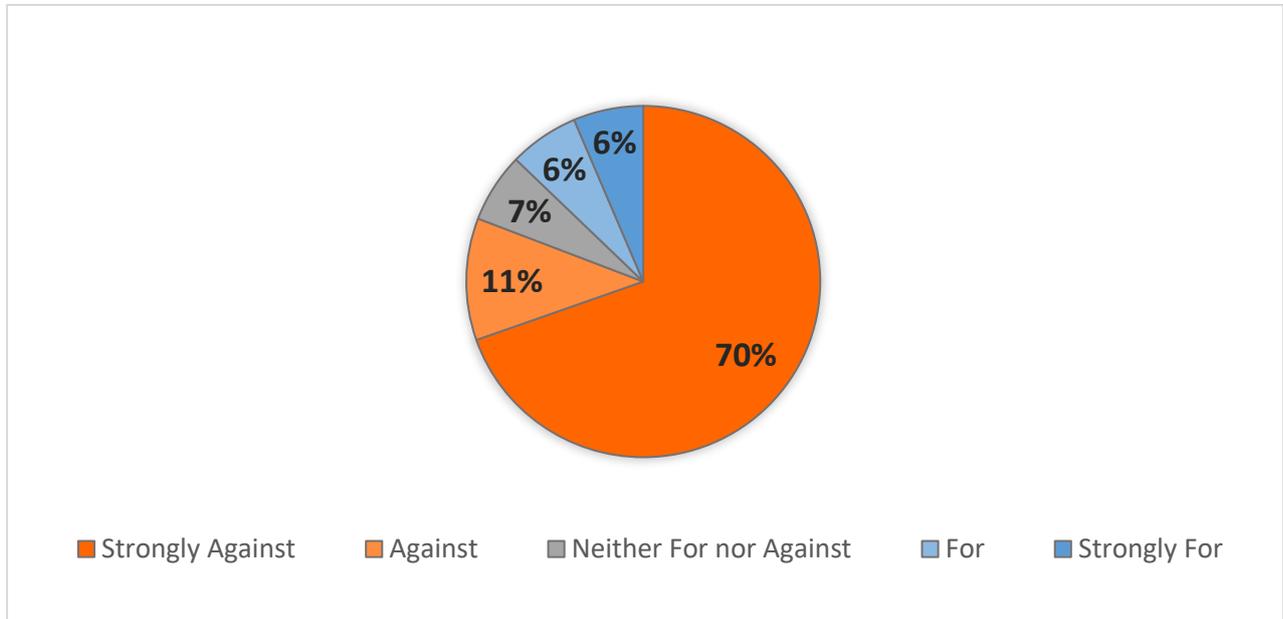


In February 2021, the Trust and Inverkeithing Community Council compiled and circulated a joint online and paper survey about a proposed housing development by DDR Ltd for 180 new houses on part of the Inverkeithing stretch of the Fife Coastal Path at Prestonhill and its former Quarry – a section of the coastal path that is well-loved and much used by the local community and visitors alike.

The main aim of the survey was to gauge the community's opinion on the proposed development. This was considered to be important and necessary community engagement to help the Trust and Community Council determine the stance they might take on any planning application, if and when this was submitted by the developers.

In summary, the majority of Inverkeithing respondents were strongly against housing on the site as shown in the survey extract below:

*Q2. What is your opinion of the current proposed development of Prestonhill, Prestonhill Quarry and coastal zone? (Including the levelling of Prestonhill, building of approx 180 houses, infilling of the quarry pool and moving the coastal path).*



At the time of writing this report, the Trust and Community Council intend to submit their comments on the proposals in line with the Inverkeithing residents' expressed opinions in the survey. It is thought the application would be submitted by the developers to Fife Council's Planning Committee for decision at some point between October and December 2021.

## **Future plans**

By working to its charitable purposes, the Trust's main aim is to help build a strong, vibrant community in Inverkeithing and to 'join the dots' for townspeople by keeping them informed about what's happening in the town.

As well as progressing the projects already mentioned in this report, the Trust is also coming up with ideas or planning for new projects – again all are dependent on time and resources available.

## **Annual General Meeting**

The Trust's first AGM is to be held on 29 October 2021 and full details will be given in early October. We hope that up to six new trustees will be elected to boost numbers on the board.

## **Summer fun project**

Plans are being finalised for a weekly summer fun project for children up to 12 years at Ballast Bank. The project will start in July and will run throughout the school summer holidays. There will be fun sports, arts & crafts and free snack lunches.

### **Annual Flower & Produce Show**

We not only hope to continue the Garden Competition in 2022, but also to bring back the town's Annual Flower & Produce Show.

### **Environmental and wildlife survey**

The plan is to work with the community, community groups and specialists to carry out an environmental and wildlife survey around the town. Hopefully this would help to identify what's there, what needs to be protected and where biodiversity could be improved.

### **Local Place Plan**

It's hoped to get the ball rolling on a Local Place Plan for Inverkeithing, probably also incorporating the above survey. Local Place Plans are part of the new planning legislation and are very important – we don't want Inverkeithing to be left behind. We'll be following Planning Aid Scotland advice and guidance on the Plan and will be working with the community, the Community Council and local groups to bring it together.

**Approved by the Trustees on 12 October 2021 and signed on their behalf by:**



**Mary Farrell**  
**Chair**

## Independent Examiner's Report to the Trustees of Inverkeithing Trust

I report on the accounts of the charity for the year ended 31 March 2021 which are set out on pages 13 and 14.

### 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 trustees consider that the audit requirement of Regulation 10(1) (d) of the 2006 Accounts Regulations does not apply. It is my responsibility to examine the accounts as required under section 44(1) (c) of the Act and to state whether particular matters have come to my attention.

### Basis of independent examiner's statement

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

### Independent examiner's statement

In the course of my examination, no matter has come to my attention which gives me reasonable cause to believe that in any material respect the requirements:

- a) to keep accounting records in accordance with Section 44(1) (a) of the 2005 Act and Regulation 4 of the 2006 Accounts Regulations;
- b) to prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 Accounts Regulations;

have not been met, or:

- c) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Name: DAVID WILLIAMSON

14 BAXTER ROAD

Address: CROSSGATES

FIFE

KY4 8AQ

Signed: David Williamson

Date: 11/10/21

## Statement of Receipts & Payments

For the year ended 31 March 2021

	£	£	£
<b>Receipts</b>			
Donations (for Pantry project):			
• Kingdom Housing Association	250		
• Campion Homes	250		
Donations (other)			
• Amazon Smile	13		
Grants (for Pantry project):			
• Eats Rosyth	250		
• Fife Council Community Food Support Grant	7,355		
• The Robertson Trust	2,000		
<b>Total receipts</b>		<b>10,118</b>	
<b>Payments</b>			
Donations to community groups:			
• Community Garden	800		
• Knitting Group	320		
Other expenditure:			
• Zoom licence	144		
• Website licence	99		
• Public Liability Insurance	316		
• Community noticeboard - materials	169		
• Pantry			
- freezer purchase	1,276		
- FareShare Scotland (supplies Jan-Mar21)	1,206		
<b>Total payments</b>		<b>4,330</b>	
<b>Surplus / (Deficit) for year</b>			<b>5,788</b>

## Statement of Balances

### For the year ended 31 March 2021

	£	£
Bank and cash balances at start of year	19,334	
Surplus / (deficit) shown on Statement of Receipts & Payments	5,788	
<b>Bank and cash balances at end of year</b>		<b>25,121</b>

#### Liabilities

No liabilities at year end.

The restricted funds for the period amount to £10,105 in relation to donations and grants received for the Pantry project.

The notes on page 15 form part of these accounts.

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Approved by the Trustees on 20 September 2021 and signed on their behalf by:



**Mary Farrell**  
Chair



**Ross Spalding**  
Treasurer

# Notes to the Accounts

## for year ended 31 March 2021

### 1 Basis of Accounting

These accounts have been prepared on the Receipts & Payments basis in accordance with the Charities & Trustee Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (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. The Trust has unrestricted funds of £15,016 for the period.

Restricted funds may only be used for specific purposes. Restrictions arise when specified by the donor or when funds are raised for specific purposes. The Trust has restricted funds of £10,105 for the period.

### 3 Related Party Transactions

No remunerations or expenses were paid to the trustees or any connected persons during the year to end March 2021. (Reimbursement for purchase of materials relating to charitable activities was made to a trustee, amounting to £83.)