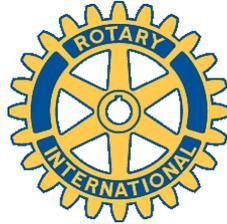


PENRITH ROTARY CLUB



PENRITH ROTARY CHARITABLE TRUST FUND

CHARITY NO. 1091676

ANNUAL REPORT 2015/16

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Penrith Rotary Charitable Trust Fund was established by Trust Deed on 23 November 2001 and was registered with the Charity Commissioners on 19 April 2002. The Trustees of the Trust Fund hold and apply monies of the Trust Fund to and for the relief of the poor and needy or such other charitable purposes as the Penrith Rotary Club shall in duly constituted meetings from time to time direct.

The Trustees of the Trust Fund are the Club's President, Secretary and Treasurer for the time being of the Club and they may co-opt any other Club members as Trustees as they consider necessary. The Club President changes annually on 1st July and the financial year of the Trust Fund is 1st July to 30th June. For purposes of the Inland Revenue, being a Trust Fund, the financial year is the tax year.

During the financial year 2015/16 the Trustees of the Fund were:

Martin Montgomery – Club President
Robert Coon – Club Secretary
Tim Southorn - Club Treasurer
Jeffrey Fawcett – Past President and Gift Aid Administrator was co-opted as a
Trustee

During the current financial year 2016/17 and at the date of this Annual Report the Trustees are:

Charles Shepherd – Club President
Robert Coon – Club Secretary
Tim Southorn – Club Treasurer
Jeffrey Fawcett – co-opted

The Trustees do not receive any expenses or remuneration for undertaking this role and the disbursement of the monies within the Trust Fund is decided by the membership of the Club at duly constituted meetings.

The bank account of the Trust Fund is held with Barclays Bank plc, Market Square, Penrith and the independent examiner of the Fund's accounts is Mr. M. Coen, Accountant, 17 Juniper Way, Penrith. The Fund does not have a principal office but correspondence in relation to the Fund should be sent to:

Mr. J. Fawcett
'Candia'
Carleton Village
Penrith CA11 8TP

Charitable income generation during this financial year was again successful and totalled £11,292 compared to £12,317 last year. In addition to this amount a street collection was held on the 11th and 12th December 2015 following the devastating floods which hit the county and raised a magnificent sum of £4634. In relation to the normal fundraising the more substantial **net** amounts were raised by the following; – the **annual golf competition raised** £4181 of which £3500 was given to the charitable trust fund and the remainder to the Club's Benevolent Fund to support benevolent local good causes/individuals which may not necessarily be charitable within the terms of the Club's Charitable Trust Fund's objects; **Trail Run** £2369; **Burns Night** £1457; **Penrith Swimmathon** £856; members donations for **Rotary Foundation** £520; £447 was raised from a 'bag pack' in a local store; **Gift Aid** totalled £403; £320 was raised from members by their weekly fun '**Fines Box**'; the remaining income was raised from corporate sponsorship, donations and bank interest.

Total expenditure was £17,194 but this included the fundraising made on behalf of the victim of the floods indicated above. In addition to the £4634 raised from the street collections the Club and some of the members donated a further £850, a total of £5484 which was forwarded to the Cumbria Community Foundation Flood Relief Fund. We are appreciative to Eden District Council for facilitating an emergency collection permit but particularly to members of the public who contributed so very generously.

The more major disbursements of our normal fundraising were made as follows:–

INTERNATIONAL PROJECTS

- Rotary continues to be active in helping to relieve the plight of the disadvantaged of the world and works towards making the world a better place for the many who have no hope other than from our Rotary movement. In support of this ideal the following grants were made for overseas aid. £1200 was used to purchase 2 **Shelter boxes** each of which contains one ten-person tent, ten sleeping bags and ancillary associated equipment for use when disasters occur throughout the world; £200 was given to the **Kaloko Trust UK** which works to advance education and to promote the healthcare of communities in rural Zambia through the development and support of a training centre, schools and health clinics; £200 was used for the purchase of **Aqua boxes** which each provide water purification systems to produce 1100 litres of water and the boxes are then sent by the charity to other voluntary organisations to be filled with added welfare aid items such as tools, clothes and hygiene equipment which are held for sending to any disaster in the world; **the Open Arms Hospice in Malawi** was granted £400 ; and £300 was provided towards a project to restore a blind childrens home in Dhulike, Nepal, damaged by devastating earth quakes.

Since its formation in 1905 Rotary International has progressed to be the world's largest service organisation for business and professional people with some 1.2 million members in 168 countries. In 1917 Rotary formed the **Rotary Foundation** which sponsors international educational and humanitarian programmes amounting to some US\$90 million annually. Merely as an example, the educational programmes include more than 1,300 Ambassadorial Scholarships for study in another land. Humanitarian programmes improve health care systems, support sustainable sources of food and water, and provide literacy and vocational training – particularly in developing countries. Members donated £600 to the Foundation..

- The greatest project being undertaken by Rotary is its commitment to eradicate polio from the world. Started in 1985 the **polio eradication programme** provides funding for vaccine and transportation for mass immunization campaigns as well as support for social mobilization, surveillance, and laboratories to help carry out the final stages of global polio eradication. Rotary is a spearheading partner with the World Health Organisation, UNICEF, and US Centres for Disease Control and Prevention. Rotarians have raised over \$800 million in support and provided hundreds of thousands of volunteer hours. To date 2.5 billion children under five have received the polio vaccine, five million people who might otherwise be paralysed are walking today. In March 2014 India was declared polio free and also the South East Asian Region of 1.8 billion people in 11 countries was certified polio free. Polio infected nations have dropped from 125 to just 3, Afghanistan, Nigeria, and Pakistan. UNICEF are hopeful to finally eradicate polio in the next few years. Rotary International and the Bill and Melinda Gates Foundation has pledged to raise a further \$525 million towards this final phase **of polio eradication**, and Penrith Rotary donated a further £600, in addition to the £4400 in the seven previous years.

LOCAL PROJECTS

- For many years Penrith Rotary has been very supportive of local young people and endeavour to lend the hand of Rotary to enable young people to fulfill their needs, to extend their aspirations, and to help them achieve their goals. £604 was used to send a disabled young person to the **Calvert Trust for the Disabled**. Each year we contribute to a day's outing for members of the **Eden District Mencap** and £750 was provided; the £300 'fun fines box' raised by members at their meetings was also given to Eden Mencap; £530 was used to fund the attendance of a senior school pupil on **Rotary's Youth Leadership Awards course**, which enables young people with potential to develop leadership skills; **Rotary's Life Education Caravan**, which is manned by two trained educators, visits junior schools within this Rotary District and delivers guidance on making healthy life style choices, received £400; £100 was awarded to the **Penrith Mountain Rescue**, in addition to the £1600 in the last 3years.

- **Eden Community Alarms** was awarded £500, in addition to the £2000 in the last 3 years, towards their valuable work; a sum of £98 was spent providing 2 **coffee mornings** for senior citizens and members of care homes; in recent years, to promote **Rotary's End Polio campaign**,

we have **planted purple crocuses** in the central carriageway from Haweswater Road towards the junction 40

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roundabout. The colour purple is that painted on a child's fingernail to indicate it has received the polio vaccine – bulbs and signage costs this last year were £300; £100 was given to the **Riding for the Disabled Association** to support their valuable work; £500 was donated to **MacMillan Nursing; Cauldwell Children** which provides family support, equipment, treatment and therapy for disabled children was granted £300 ; other **small donations** were also distributed to a number of organisations.

Penrith Rotary Club also works with the schools in the town, and particularly the two senior schools, to help with the development of pupils. The sum of £2900 was spent on a number of projects such as **Young Musician; Young Enterprise Northwest**, which is to inspire and educate young people to understand the role of business through practical business projects and develop attitudes and skills for personal success, lifelong learning and employability; entry into the **Regional Technology Tournament** which challenges students to find solutions to design and technology problems; **Ready Steady Cook competition** with over 200 pupils taking part; **Youth Speaks**, developing public speaking skills; **Young Writer; Young Linguist**; and providing financial support to a young person who undertook **voluntary work overseas**.

The accounts of the Trust for 2015/16, were approved by the members of Penrith Rotary Club at their Special General meeting held on 23rd November 2015.

There is a requirement of the Charity Commissioners that all charity trustees should periodically review the major risks to which their charity is exposed and the systems established to mitigate those risks. The Trustees of the Penrith Rotary Charitable Trust Fund are satisfied that the Trust is not exposed to any major risks and that their grant making is solely dependent on the extent of fundraising received. All accounting practices are in accord with the Charity Commissioners requirements.

This Trust Fund is very dependent on the local community for their support and generosity and the Trustees would like to take this opportunity of expressing sincere appreciation to all who contributed to this last successful year.

Signed.....
(Martin Montgomery)
Club President & Trustee

Signed.....
(Robert Coon)
Club Secretary & Trustee

Signed.....
(Tim Southorn)
Club Treasurer & Trustee

Signed.....
(Jeffrey Fawcett)
Past President & Trustee

