

REPORT BY THE TRUSTEES OF THE QUEEN' S OWN GURKHA LOGISTIC REGIMENT REGIMENTAL TRUST FOR THE YEAR ENDED 31ST MARCH 2023

Background.

The original Queen's Own Gurkha Transport Regiment Regimental Trust came into being on 2nd April 1992, when the Trust Deed was formally adopted. Subsequently the structure of the Regiment changed dramatically as a result of reductions within the Brigade of Gurkhas and the withdrawal from Hong Kong.

Until 31st November 2012 the Regiment was embodied within 1, 28, 36, 66 (Fuel) & 94 Squadrons QOGLR, together with the 10QOGLR Light Aid Detachment all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and 9 Regiment The Royal Logistic Corps and other worldwide outlying detachments. Subsequently (from 1st December 2012) the Regiment re-rolled as a Theatre Logistic Regiment. It was then embodied within 1 Supply Squadron, 28 Fuel and General Transport Squadron, 36 Headquarters Squadron and 10 QOGLR LAD, all of which were integral units of 10 The Queen's Own Gurkha Logistic Regiment and other worldwide outlying detachments. The recent expansion of the Brigade of Gurkhas has resulted in the Regiment gaining additional Squadrons and roles. The new Squadrons are 14 Sqn, 15 Sqn, and 94 Sqn with 31 Sqn expected to be formed from 2023.

Objects of the Trust

The objects of the Trust are:

- a. To promote the efficiency of the Regiment and the maintenance of its history, traditions and esprit de corps.
- b. To purchase such chattels and other property as is, in the opinion of the Managing Trustees, for the benefit of the Regiment and to insure and maintain such property.
- c. For other charitable purposes, promoting efficiency or esprit de corps of all ranks of or serving with the Regiment, including the provision of recreational facilities and amenities not provided for out of public funds.
- d. To provide for the relief of hardship, distress or poverty amongst serving or former members of the Brigade of Gurkhas and dependents by the provision or application of monies whether by gift or loan.

These objects have been borne in mind by the Trustees during the period under review.

The Charity receives a generous grant each year from the Brigade Education and Welfare Fund. This is found from the Soldiers Day's Pay Giving scheme and must be spent within the financial year on activities that directly benefit serving members of the Regiment and their families. Owing to the deployment of much of the Regiment overseas it was NOT possible to spend the grant in full and HQBG have been informed of this. A residue of £2,958.30 remains to be voted upon at the Trustees Meeting to be held on 12 April 2023. A list of activities supported will then be submitted to HQBG and a copy attached to the accounts.

Public benefit

The Fund achieves its objectives by the making of charitable grants out of its capital and income for the purpose of promoting the efficiency of the armed forces of The Crown, particularly by supporting the welfare of serving personnel and in commemorating the history and traditions of the Regiment.

The Charity usually makes a range of grants that award initiative, support adventurous training and sport, and other activities that are not adequately, or directly, provided from Public Funds. A wide range of activities were supported.

The Trustees consider, therefore, that the Charity more than met the requirement to provide Public Benefit under the charitable "Head" of "the promotion of the efficiency of the armed forces of The Crown". (*Explanation; There are number of "Heads of Charity". One of these is the promotion of the efficiency of the armed forces of The Crown and the emergency services*).

The Charity is still in its comparative financial infancy and this restricts to some extent its ability to meet every objective. The addition of the new Squadrons has resulted in expenditure to ensure that they really feel part of the Regiment and adopt its ethos and traditions. With the expansion of the Regiment the Trustees have agreed that they must strive to increase the reserves of the Fund to serve a larger community of potential beneficiaries.

Trustees and advisers.

The Colonel of the Regiment and Chairman of the Board of Trustees is Brigadier Patch Reehal MBE who was appointed on 1st August 2020.

Other Ex-Officio Trustees are:

Commander QOGLR Lieutenant Colonel Giles Sugdon
Gurkha Major QOGLR Major Basantadhoj Shahi
Major Mike Ruocco
WO1 (RSM) Lokbahadur Sunuwar

Co-opted Trustees:

Major General Ian Copeland CB,
Lieutenant Colonel (Retired) Paul Gilham

The OC 1 Squadron QOGLR is Secretary to the Trustees.

The Officer Commanding 36 (HQ) Squadron QOGLR Major Emerson Hanley is Secretary of the Finance Committee which consists of the Co-Opted Trustees and Major (Retd) Mike Adler. Maj Adler is NOT a voting member of this Committee.
Major Gav Randell is the Property member.

The Independent Services Agency Ltd provides Treasurer support to the Trustees.

The Trustees continue to make use of Holt's Military Banking (part of the Royal Bank of Scotland plc) as their Bankers.

The Trust's investments are now entirely with the BlackRock Armed Forces Charities Growth & Income Fund (BRAFCG&IF income units).

Income and Expenditure

Income was derived wholly from the BRAFCG&IF income units. A small amount of bank deposit interest accrued. The Brigade Education and Welfare Fund made a grant of £19,688.22 which was used for welfare purposes within the expanded Regiment. The Trustees are continuing to grow the assets of the Charity in order to provide funds for future benevolence and the well-being of the Regiment.

Risk assessment and policy.

The Trustees review the risks, which might affect the Charity, on a regular basis. The main risk is assessed as being a major collapse of the Stock Market but, nevertheless, they consider that their investments, which are professionally managed, are as well diversified as they can be. The Trustees have experienced previous down turns in the market but, being a charity with long term expectations and requirements, they are content that their present investment policy is the proper one. Written policy documents are in place to cover risk management, investment and conflicts of interest. No such documents are required to cover volunteer management, safeguarding vulnerable beneficiaries and complaints handling as the Charity is most unlikely to have any involvement in such matters.

Activities and achievements.

All the activities planned for during the year were achieved and were successful.

Governance.

Trustees are selected on the basis of special skills that they can offer which will benefit the Charity in terms of its operation. A balance is maintained in order to ensure that both the retired and the serving elements of the Regiment are adequately represented. Trustees' training is mainly achieved by virtue of positions held by Trustees in their civilian or military capacities. Where necessary, the Independent Services Agency Ltd provides specialised technical advice on relevant current charity matters.

The Trustees are all "volunteers" and offer their services on a financially un-rewarded basis. No other volunteers are employed.

The Charity has no trading subsidiary and is not a member of the Fundraising Standards Board as it does not seek to raise funds.

Plans for the future.

Trustees plan to allocate funds to meet the needs of the expanded Regiment. Thus they intend to continue to grow the assets of the Charity and to assist the Regiment with grants for suitable charitable purposes.

Signed by a Trustee on behalf of all the Trustees

Original document signed

The original document was approved at the Trustees Meeting held on

..... 27th October 2023

Dated

qoglrannualreportoftrustees2023

		Excess of Income over expenditure		£7,980.54		
Cash funds last year end						
	RBS C/a			£500.00	£500.00	
	RBS D/a			£6,984.32	£7,649.07	
				-£390.00	-£262.77	
				£7,094.32		£7,886.30
		Balance after addition of Excess of Income over expenditure		£15,074.86		
		Balance after deduction of excess expenditure over income				£6,831.55
			Add back last year's uncleared			£262.77
						£7,094.32
Cash funds this year end						
	RBS C/a			£500.00	£500.00	
	RBS D/a			£15,174.86	£6,984.32	
		less uncleared item		-£600.00	-£390.00	
				£15,074.86		£7,094.32
qogtraccounts2022/2023						
Original Signed by a Trustee on behalf of all the Trustees.						
Dated						

BEWF RETURN 2022 2023			
Date	Activity	Voucher	
09/06/2022	CB 10 QOGLR QOGLR BALLERS	320	£850.00
09/06/2022	CB 10 QOGLR EX TIGER JWALAMUHKI	321	£500.00
27/05/2022	CB 9 SUP REGT RLC Ping Pong Warriors	361	£250.00
30/08/2022		323	
	10 QOGLR Dashain & Tihar		£2,500.00
	QOGLR Birthday		£2,500.00
	P&D Cohesion	covered	£300.00
	QOGLR WO1 &WO2 Ladies Night	by one	£400.00
	QOGLR Chef TRF	cheque	£468.76
	QOGLR Chef 20th Anniversary	No 000323	£1,000.00
	TRAILWALKER		£1,500.00
	31 SQN Property		£600.00
	WW1 Photographs		£200.00
11/11/2022	CB 10 QOGLR Dashain Sqns & Ski Team	325	£1,900.00
28/10/2022	9 SP REGT RLC VOLLEYBALL	326	£350.00
20/01/2023	13 Air Assault Support Regiment/ Mandir	328	£3,391.16
Amount shown on nnuual accounts for the year ended 31 March 2023			£16,709.92
Subsequent grants made	OP TOSCA 37 Roll of Honour Boards	covered	£270.00
	EX SNOW PANTHER Skiing	by one	£1,150.00
	Gate Guardian Project	chq no	£300.00
	Cpl Krishna Headstone Memorial	333	£200.00
	QOGLR Ladies Expedition	331	£1,000.00
			£19,629.92
	Total amount received		£19,668.22
	Underspend		£38.30

