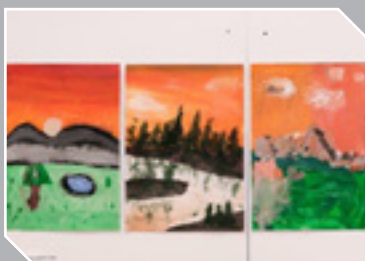
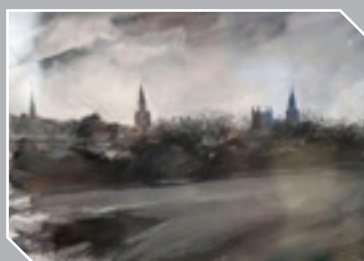
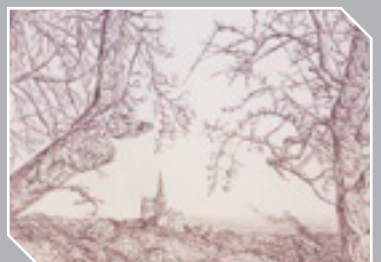


THE CARNEGIE DUNFERMLINE & HERO FUND TRUSTEES









ANNUAL REPORT 2021



Berrylaw Competition Images



Contents

	Trustee Report for the Year ended December 2021	2
	Objectives and Activities	2
	Achievements and Performance	2
	Andrew Carnegie Birthplace Museum	5
	Museum Development	5
	Engaging with our community	5
	Collections and building	6
	Carnegie Dunfermline Trust	7
	Key Statistics 2021	7
	2021 – another year of global pandemic	8
	Emergency Grants	9
	Sports	10
	Community Projects	11
	Creative Arts	14
	Schools	15
	Project grants previously awarded, completed this year	16
	The Carnegie Hero Fund UK	17
	Heroism	17
	Presentations	17
	Visitors to Dunfermline	18
	COVID-19 Entry in Roll of Honour	19
	Entries in the Roll of Honour	21
	Our Criteria	23
	Carnegie Dunfermline Trust	24
	Summary Statement of Financial Activities	24
	Balance Sheet	25
	Carnegie Hero Fund Trust	26
	Summary Statement of Financial Activities	26
	Balance Sheet	27
	Trustees and Staff	28
	Board of Trustees	29
	Acknowledgements	30

Trustee Report for the Year ended December 2021

Objectives and Activities

Andrew Carnegie established the Carnegie Dunfermline Trust by a handwritten letter in 1903. The purpose of the Trust is to add value to the lives of the people of Dunfermline, the place of his birth.

The Carnegie Dunfermline Trust's objective is to bring 'sweetness and light' into the lives of the people of Dunfermline with a particular focus on 3 main areas.

1. To improve health and wellbeing
2. To alleviate poverty
3. To reduce loneliness

The Trustees seek to fulfil these objectives by:

- Delivering a grant giving programme to local groups, charities and schools
- Operating and developing the Andrew Carnegie Birthplace Museum to inspire others through sharing the story of his remarkable life and continuing legacy as one of the world's finest philanthropists
- Entering into partnerships with other organisations who have similar values to drive forward innovative projects that will benefit Dunfermline.

In addition to the Carnegie Dunfermline Trust, the Trustees also oversee the work of the Carnegie Hero Fund Trust. The Carnegie Hero Fund Trust was established in 1908. The objective of the Trust is to recognise acts of civilian heroism which take place in Great Britain, Ireland, the Channel Islands or surrounding territorial waters, where the hero has died or suffered life-changing injuries while attempting to save another human life.

The Trustees seek to fulfil this objective by:

- Recognising the act of heroism and awarding a citation and certificate.
- Recording the heroic act in our beautiful hand-calligraphed Roll of Honour.
- Providing ongoing support and financial assistance (where necessary) to the recognised hero and/or their dependents for as long as required.

Achievements and Performance

2021 saw a second year of the global Covid-19 pandemic. Despite the constraints and challenges of the pandemic, the charitable work of the Trust did not falter, and a great deal of positive work was achieved.

The start of the year saw a further national lockdown and the staff team worked remotely from home. As restrictions eased during the year, a hybrid of home and office working became the norm and this pattern continued throughout the year. To ensure staff and Trustee safety, Board Meetings were held either virtually via Zoom, or socially distanced in Andrew Carnegie House.

The lockdown restrictions delayed the opening of the 2021 Museum season, and the doors did not open to the public until May. International tourism numbers were severely impacted by the ongoing travel restrictions; however, we were heartened to see local people and staycationers visit the museum creating a hub of community activity. At the end of July, the Trust bade a fond farewell to Museum Manager/Curator, Kirke Kook and wished her well for her new career. In September, the museum welcomed two new co-managers, Jennifer Jones and Mark Macleod, and they bring with them a wealth of complementary skills, ideas and experience.

A successful Trustee recruitment campaign was launched in Spring, and we were overwhelmed to receive a high number of quality applications. Following a rigorous selection process, four new Trustees: Thomas Docherty, Rachel Doyle, Victoria Simpson and Ruth Strain, were welcomed onto the Board in June.



From left to right: Rachel Doyle, Ruth Strain, Victoria Simpson and Thomas Docherty

As well as the new Trustees, the Trust also appointed three Carnegie Young Ambassadors, Chloe Dunbar, Danielle Hetherington and Jake Graham. They bring fresh ideas and a young person's perspective to the work of the Trust.



From left to right: Danielle Hetherington, Chloe Dunbar and Jake Graham

The biennial Carnegie Medals of Philanthropy event had been due to take place in New York in 2021, however, it was not possible for this to go ahead due to the ongoing pandemic. Instead, the global family of Carnegie institutions met via Zoom for a series of business meetings in June. This allowed each organisation to reflect on the pandemic, present how they had responded to the crisis, and discuss areas for mutual collaboration.



Gillian Taylor's presentation at one of the Carnegie Business meetings

Pittencrieff Park, known locally as the Glen was Andrew Carnegie's most 'soul-satisfying' gift and this beautiful green space in the heart of Dunfermline, has been a haven for many during the pandemic. During 2021, a Pittencrieff Park Ambition Group was established in partnership with Fife Council and has the mission of making Pittencrieff Park Scotland's primary destination park for happiness, health, education and wellbeing. A well-attended, public conversation was held during the first week in August to capture people's thoughts and ideas for the future of the park and the buildings.



Pittencrieff Park public conversation

The Trust has a long history of collaborating with other like-minded organisations to add value to the lives of people in Dunfermline. In the summer we were awarded Heritage Lottery Funding for a new 'Wellbeing through Heritage' project in partnership with Fife Council, NHS Fife, Fife Cultural Trust and Fife Coast and Countryside Trust. This 3-year project will utilise our indoor and outdoor heritage buildings and spaces to run activities that will improve people's mental health and wellbeing following the pandemic.



Gillian Taylor and Cllr Helen Law marking the launch of the Wellbeing through Heritage partnership

In November, Glasgow hosted the global COP26 Climate Change Summit with delegates attending from around the world. The Trust invited the Mayor of Pittsburgh, Bill Peduto, over to Dunfermline for the weekend following the summit. A civic reception was held to welcome Mayor Peduto and celebrate the unique history between Dunfermline and Pittsburgh. Positive conversations on how to strengthen and develop links were had and Mayor Peduto was guest of honour at the annual Remembrance Sunday Service.



Mayor Peduto with Gillian Taylor, Fiona Robertson, Provost Jim Leishman and Andrew Croxford

For most of the year, Hero Fund presentations were not possible due to pandemic restrictions on travel and numbers attending gatherings. However, as restrictions eased, we were able to hold two presentations, one in Dunfermline and the other in London. It was lovely for Trustees and staff to finally meet and connect with the families and find out more about the heroes involved.

In addition, Hero Fund Manager, Liane Horder hosted several visits by families to the museum to view the Roll of Honour entries for their loved ones.

As Dunfermline continues to expand, the Trustees have looked at ways of raising awareness of the valuable work of the Trust. 2021 saw the launch of a new Carnegie Dunfermline Trust website and the introduction of a Facebook page.

The year ended with the Trust offering an online panto experience to all primary schools in Dunfermline and



Homepage of the new website

commissioning an 'Enchanted Glen' lighting event in Pittencrieff Park. These events provided safe activities for children and families to enjoy while large indoor gatherings were curtailed due to the pandemic. We are sure that Andrew Carnegie would have approved of the Trust arranging these winter events to spread 'sweetness and light' at the end of another challenging year.



Trustees, Young Ambassadors and family at the launch of the Enchanted Glen lighting event

Andrew Carnegie Birthplace Museum



Mark Macleod and Jennifer Jones

After a challenging 2020 for the museum, the year started with another lockdown. Happily, the museum was able to open its doors to the public again on 17th May. The museum team remained their usual cheerful and enthusiastic selves through this difficult time, and the continued engagement with the museum and its story is a testament to their hard work. The tourism and heritage sector has been hit hard by the decline in visitor numbers, but we continue to see this as a new opportunity to engage with our visitors on different levels and platforms.

The museum welcomed a new manager, or should we say two! Mark Macleod and Jennifer Jones joined the museum in September as co-managers, bringing with them over 25 years' experience working in museums, both nationally and internationally. They are Dunfermline residents and are bringing new ideas and enjoying getting to know the museum and the communities it serves.

Museum Development

The Museum participated in a National Lottery Heritage Fund skills development programme, Steps to Sustainability, to review and redevelop the Museum's retail offer and income generation model. This has included peer support and mentoring and is already delivering improvements.

Engaging with our community

Throughout the year, the team continued to build upon their digital outreach which they had begun to develop in 2020. Varying Covid-19 restrictions throughout the year meant the team had to be agile and flexible, and our programming was delivered as a mixture of online and in person.



Garden boxes at the museum

The museum has continued to work in partnership with our community, through collaborative educational offers with the Heritage quarter, loan boxes and resources with local schools, and new garden boxes at the museum delivered by the TURN men's group.

A painting in the museum 'Dunfermline from the Northwest' by Andrew Blair was the source of inspiration for a summer community art project in partnership with the Great Places Scheme. Local artist, Alan Grieve, led guided walks up Berrylaw Hill and participants captured modern interpretations of the stunning landscape in paintings and photographs. The art works were displayed in a temporary exhibition in the museum during Autumn, a selection of these are featured on the inside cover.

Collections and building

We received funding from the Association of Independent Museums to survey and improve our collections storage. An expert from Sustainable Heritage was commissioned and their report has allowed us to plan a programme of improvements.

We continue to respond to enquiries from researchers and organisations around the world, and support the publications, exhibitions, and programming by supplying images of items in our collection. This is an important activity for raising our profile, encouraging research on our collection, and generating income.



Hamilton & Inches key

In the summer, the museum loaned three items to Hamilton & Inches for an Edinburgh exhibition to celebrate their 155th Anniversary. Museum loans are a great way to reach new audiences and tell new stories with our collection.

An insurance valuation was carried out on the collection in the summer. This activity also gave us a chance to review some areas of the collection and resulted in some items being loaned to the museum for safe keeping from the Carnegie Dunfermline Trust art collection. In addition, the museum collection received gifts from a number of other generous benefactors, including the Carnegie Corporation of New York.



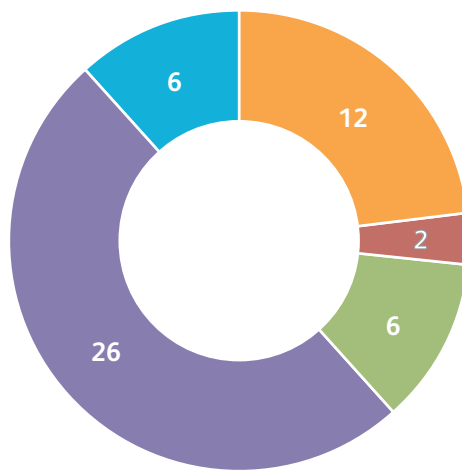
Hamilton & Inches Casket

Carnegie Dunfermline Trust

The Carnegie Dunfermline Trust makes grant awards over four broad categories: Community; Creative Arts; Schools and Sport.

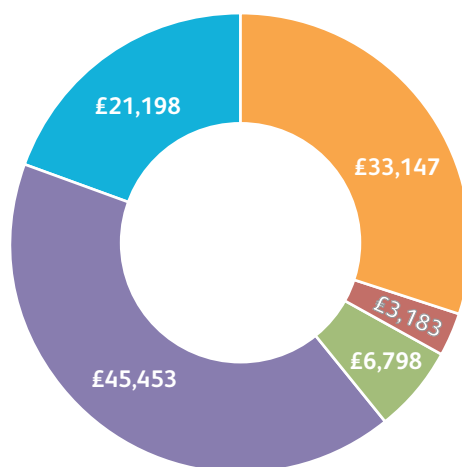
Key Statistics 2021

Number of Awards Made



Community & General Creative Arts Emergency Grants Schools Sport

Amount Awarded



Community & General Creative Arts Emergency Grants Schools Sport

2021 – another year of global pandemic

While 2020 was an exceptional year, as Covid-19 swept across the globe and the country went into lockdown, 2021 continued to provide challenges - a mass vaccination programme was in full swing, but there were still restrictions on individuals, businesses and organisations who had to continue to observe social distancing, mask wearing and limitations on indoor gatherings – which is reflected in some of the photographs. The Trust continued to offer small Emergency Grants (<£1500) to assist recovery.

Trustees were particularly aware of the disruption to schools and in addition to the book tokens for P7 project prizes which are awarded annually, provided funding towards P7 end of term parties, a copy of the *Rossie the Rabbit* book to all local P4 pupils, as well as an online pantomime for a festive treat for all our local primary schools.



*Thank you cards from P4 pupils for the *Rossie the Rabbit* book*

Emergency Grants

The following organisations and groups received 'Emergency Grants':

Name	Award	
Queen Anne High School	£1125	Books for 'Covid' book boxes in the community
St Leonard's Church	£1500	Laptops to enable worship to be conducted over Zoom
Dunfermline Junior Chorus	£1500	Resumption of rehearsals and workshops
Fife Festival of Music	£1500	For 2022 Festival – unfortunately cancelled due to continuing restrictions
Dunfermline 4th (Abbey) Boy's Brigade Company	£173	Annual Zoom licence
Real Life Options	£1000	Social Activity Programme for adults with learning difficulties



Members of the Dunfermline Junior Chorus pictured outside the Vine Centre after attending a rehearsal in June 2021, the first since March 2020



Socially distanced indoor rehearsals for the 'Music Makers' of Dunfermline Junior Chorus

Sports

Dunfermline Water Polo Club



The new scoreboard 'in action' at a recent event at the Carnegie Leisure Centre

A grant of £4000 was awarded towards the purchase of a new scoreboard to be installed in the training pool at the Carnegie Leisure Centre where the club trains and hold competitions. The new scoreboard's timing system is critical for measuring possession of the ball – as teams are only allowed 30 (20) seconds before attempting a shot on goal – as well as keeping score.

Dunfermline Carnegie Cricket Club

The club was awarded a grant of £5000 towards the purchase of a ride-on mower to be used to cut the outfield at McKane Park where the club trains and plays. The cylinder mower is needed to cut the grass short enough to make it suitable for cricket.



Cylinder ride-on mower in action

Other grants in this section were:

Name	Awarded	
South West Fife Sports Partnership	£1450	Creation of passing places on access road
Dunfermline Bowling Club	£5000	Rewiring of club house
Dunfermline Track & Field Club	£5568	Mats for high jump and pole vault
Dunfermline & West Fife Sports Council	£180	Hockey coaching in primary schools

Community Projects

St Ninian's Church

The Trustees awarded a grant of £3257 towards a pilot youth project in Abbeyview which took place during 2021. Following a fire at the local high school in 2019, it was recognised that there was a need for further support for the young people in this area. Youth workers developed links with local schools, organisations, businesses and statutory services and delivered 6 detached youth work sessions. The aim is to establish a youth committee as the voice of young people with a view to develop regular children's and youth provision in the Abbeyview area.



Young people enjoying an activity session at the Abbeyview youth project



Volunteers at work in Dunfermline Abbey Churchyards, clearing, cleaning and recording gravestones

Archaeology Scotland

A grant of £6950 was awarded towards the educational, digital and material legacy resources elements of the Dunfermline Graveyards project, which will provide for the conservation of Dunfermline Abbey Churchyards, Dunfermline's oldest green space. Providing educational activities, community training opportunities, skills development and strategic planning for the sustainable care of this nationally and internationally important historic graveyard, the project will assist local volunteers and community groups. A web-based digital interface aims for graveyard records to be hosted on a partner website, assisting family historians; a printed leaflet available from heritage venues will be of particular local community interest, while a competition for gate design following artist led workshops, will allow for the ultimate design to be made into a new gate for the north porch of the Abbey.

West Baptist Church

The Trust awarded a grant of £1390 towards the creation of a community garden in Chalmers Street opposite the church building. In addition to providing limited car parking space for the church, the garden is available to the local community to enjoy at any time.



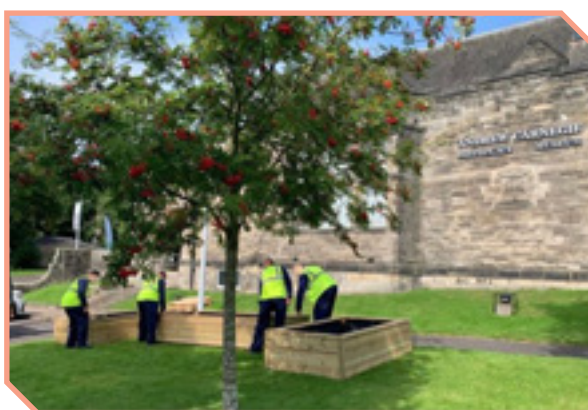
The community garden pictured at the Open Day in August 2021



The new podcast studio, with the first guest speaker, Richard Jobson

Fire Station Creative

A grant of £3200 was awarded towards the setting up of a studio for weekly video podcasts to help a variety of creative people - artists, musicians, writers, comedians and designers connect to new audiences. The pandemic has set back the careers of live performers and exhibitors and their careers will take time to recover. The informal interviews will also include live performances of book readings and songs and artists/performers will be invited to talk about their careers and projects. Available through online platforms and social media, these culture podcasts will provide the wider public free online access to the arts happening in the Dunfermline area.



Large planters being built in Moodie Street car park

TURN project

The Trustees awarded a grant of £850 to this project which provides ex-offenders with work experience. This work is voluntary and aims to reconnect the individual with their community and gain skills. The group built large planters which were filled with plants and flowers and installed in Leys Park Road car park and at the car park in Moodie Street.

Safespace

The Trustees awarded a grant of £3500 towards art therapy and art journaling sessions to this local charity which supports survivors of sexual abuse and their family members through the process of recovery. Their services are free, independent and impartial and workers are professionally trained. Artwork is an integral part of the groupwork sessions provided to clients.



An example of art therapy where a client can express traumatic memories through art imagery



Plastic-free Dunfermline

The Trust awarded a grant of £250 for the pilot production of a membership brochure to inform members about the ‘plastic-free’ champion businesses in Dunfermline. With ideas on how to reduce single-use plastic, the document will also advise on Plastic-free Dunfermline’s work and how to stay in touch and get involved.

Plastic-Free member Shirley-Anne Somerville, MSP collecting her member pack

Other grants in this section were:

Name	Awarded	
Panto tickets	£10000	For community groups
Dunfermline Gillespie Memorial Church	£1000	New youth hub
Fairway Fife	£1250	New laptop
FASS/ Fife Community Drug Service	£1500	Special Christmas grant

Creative Arts



DPA members showing off their new projector

Dunfermline Photographic Association

A grant of £483 allowed the Dunfermline Photographic Association which supports local photographers by teaching camera and technical skills, to purchase a new projector to allow a true reproduction of digital images in colour and tone. The projector will also allow the group to show images at their correct size.



Fife Dunfermline Printmakers Workshop

The Trust awarded a grant of £2700 towards the production of a short video for the 'Big Sky' cultural exchange project between the community access fine art printmaking studios in Dunfermline and Castlemaine, Australia. The video will show the printmakers in their respective workshops and will be hosted of each organisation's website and shown at the print exhibitions planned for March/April 2023.

Printmaker, Clare Yarrington working on her print "Running Tide".

Schools



Commercial Primary School

The Trust awarded a grant of £750 to allow the school to replace their current playground markings which were damaged and faded. The new markings are used by school pupils during the day and by local children after hours. They include hopscotch, alphabet ladder and games such as 'What's the Time Mr Wolf?'.

Pupils enjoying the new playground markings

HQ Explorer Past-port

A grant of £672 was awarded for woven badges used as prizes for this Heritage Quarter children's treasure hunt for families to participate in over the summer. All children who took part were awarded a certificate and a badge.



Young winners proudly showing their certificates and woven badges



Rossie the Rabbit Books

The Trust provided copies of 'Rossie the Rabbit and his Really Big Adventure' to all P4 pupils at local primary schools. The book, written by former Andrew Carnegie Birthplace Museum Manager, Lorna Owers and illustrated by Norman Stone, tells the story of Rossie meeting a dinosaur in Pittencrieff Park. Around 1200 books were delivered to 23 primary schools. A grant of £1377 was awarded.

Pupils from Commercial Primary School enjoying reading about Rossie's adventure

Other grants in this section were:

Name	Awarded	
Pitreavie Primary School Nursery	£1497	Cabin for nursery playground
Pittencrieff Primary School	£235	Munro Challenge
McLean Primary School	£230	Hockey masks
Lynburn Primary School	£1500	Audio Book project
Pitreavie Primary School	£9402	Playground for additional support
Duloch Primary School	£10000	Trim Trail
Crossford Primary School	£1440	Junior golf clubs and bags
Online Panto	£6900	Christmas end of term treat for local primary schools
P7 project prizes	£800	Book tokens for schools to award as prizes for P7 leavers
P7 End of Term parties	£1150	Contribution of £50 to all 23 local primary schools

Project grants previously awarded, completed this year



JJ Chalmers, perusing the Clubhouse Renovation supporter's board

Dunfermline Tennis and Bridge Club

A grant of £10000 was awarded in 2019 towards major renovations to the clubhouse. The works which included the remodelling of the current building and construction and fitting out of a single storey extension with a first floor balcony, modernised changing facilities, installation of new windows and doors and an accessible toilet were completed in 2021.



The official reopening took place on 30 October with invited guests.

Carnegie Hero Fund UK

Heroism

During 2021, the Carnegie Hero Fund Trust UK recognised one person and there were a further 10 cases of heroism under investigation.



Rose, Danny and Charles Ball with Gillian Taylor, Colin Firth, Liane Horder and Fiona Robertson

Presentations

A presentation to the family of Stephen Ball was held in the Boardroom of Andrew Carnegie House, the Hero Funds office in September 2021. The presentation was made by Hero Fund Chair, Fiona Robertson and attended by Stephen's siblings: Rose, Danny and Charles; Hero Fund Manager, Liane Horder; Hero Fund Chief Executive, Gillian Taylor; Hero Fund Convener, Colin Firth; Hero Fund Vice-Chair, Andrew Croxford; Trustee, Rachel Doyle; Museum Manager, Jennifer Jones; Roll of Honour Calligrapher, Annette Reid and Hero Fund Administrator, Sarah Huxtable. Stephen's heroism was recognised on 12th December 2019.

A presentation to the family of Raymond Bridges was held at Clarendon Hotel, London in November 2021. The presentation was made by Hero Fund Chair, Fiona Robertson and attended by Raymond's family: his wife Denise Gyax, Raymond's siblings, his children, Denise's family, friends and Hero Fund Chief Executive, Gillian Taylor. Raymond's heroism was recognised on 12th December 2019.



Denise Gyax and Raymond Bridges' siblings with Fiona Robertson and Gillian Taylor

Visitors to Dunfermline

It has been wonderful to welcome several Hero Fund friends to Dunfermline in the past year to visit the Andrew Birthplace Museum and see the Roll of Honour. With the easing of Covid-19 restrictions and more people feeling increased confidence in travelling in 2021, we were able to arrange 7 different visits.



Cora Polland and her boyfriend visited the museum in June 2021 to see the Roll of Honour entry for her father, Colin Polland, who lost his life in 2013 while attempting to rescue a young man who got into difficulty swimming in County Down.

Lucy Locke, Stewart McKay and Malcolm McKay visited the museum in August 2021 along with Lucy's husband and Stewart's wife. They came to see the entry in the Roll of Honour for William Percy Wise (their uncle). William lost his life in 1941 while attempting to rescue a young woman from drowning in the sea at Blackpool.



Karen and Toner Harris and Elaine and Colin Baines visited the museum in May 2021 to see Eric Baines' (Karen's grandfather and Colin's father) entry in the Roll of Honour. Eric died in 1988 as a result of the injuries and exertion he sustained while rescuing a young girl from a campervan fire in Pwllheli.

Consett Visit to Dunfermline



Consett visitors with Provost Jim Leishman at East End Park Football Stadium

In September 2020, representatives of the Hero Fund took part in the unveiling of a memorial to the men who had died while working at the Consett Iron Works in Consett, Durham. This included nine men who were recognised by the Trust who lost their lives attempting to save two fellow workers who had been overcome by fumes in 1950. During their visit to Consett, John O'Connor the organiser of the memorial service, relayed that he was part of a "group of lads" (aged 60-75) who met at Consett Rugby Club every Sunday. Each year they visit a town in Scotland where they attend a local football match.

On 6 November the "group of lads" visited Dunfermline and were given a tour of East End Park, home of Dunfermline Athletic (the Pars), visited the Andrew Carnegie Birthplace Museum to see the Roll of Honour entry of the nine men before attending Dunfermline Athletic v Morton match. Sadly, Dunfermline lost!



COVID-19 Entry in Roll of Honour

Life has been hard for us all since the start of the pandemic in March 2020. Adjusting to all the restrictions has not been easy but hopefully we are through the worse. Thanks must go to everyone who had no option but to leave their homes to go to work to support the rest of us. Medical staff, carers, shop workers, teachers, public transport workers, the list is endless. Sadly, some of these essential workers lost their lives.

To honour these brave people the Trust has dedicated a page to them in the Roll of Honour.

Covid-19 entry in the Roll of Honour

Old Case Enquiries

This year we received 44 requests for information about cases from past years and 7 replacement certificate orders.

Enquiries

To make enquiries about a case from the past, please contact the Trust with the following information:

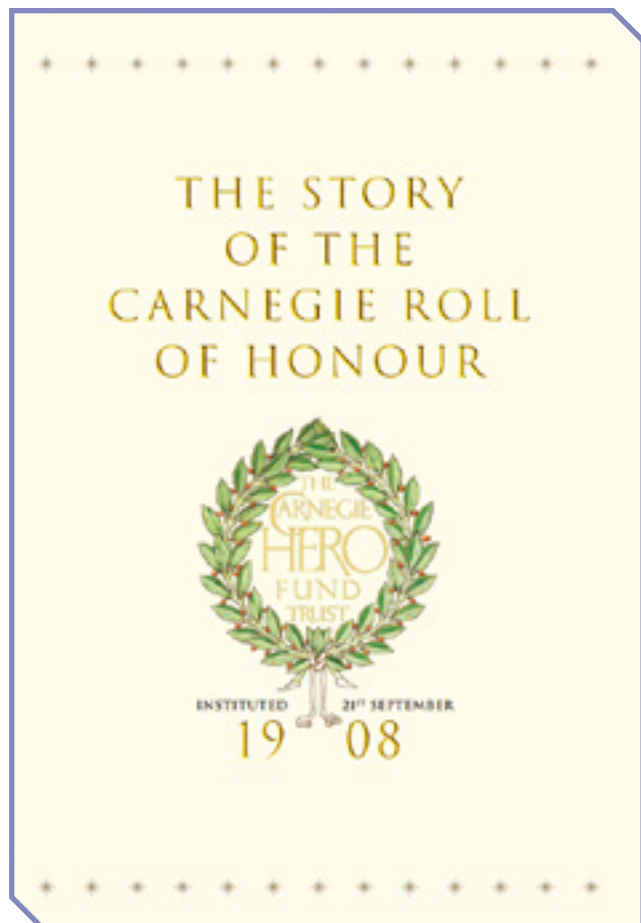
- name of person whose heroism was recognised by the Hero Fund
- your relationship to them
- date, place and nature of the incident which took place and any further details known to you
- state if you have a copy of the certificate
- if not, state how you found out about the award

The Trustees will endeavour to provide as much assistance as they can in answering queries but reserve the right to only release such information as is available or appropriate to the enquiry.

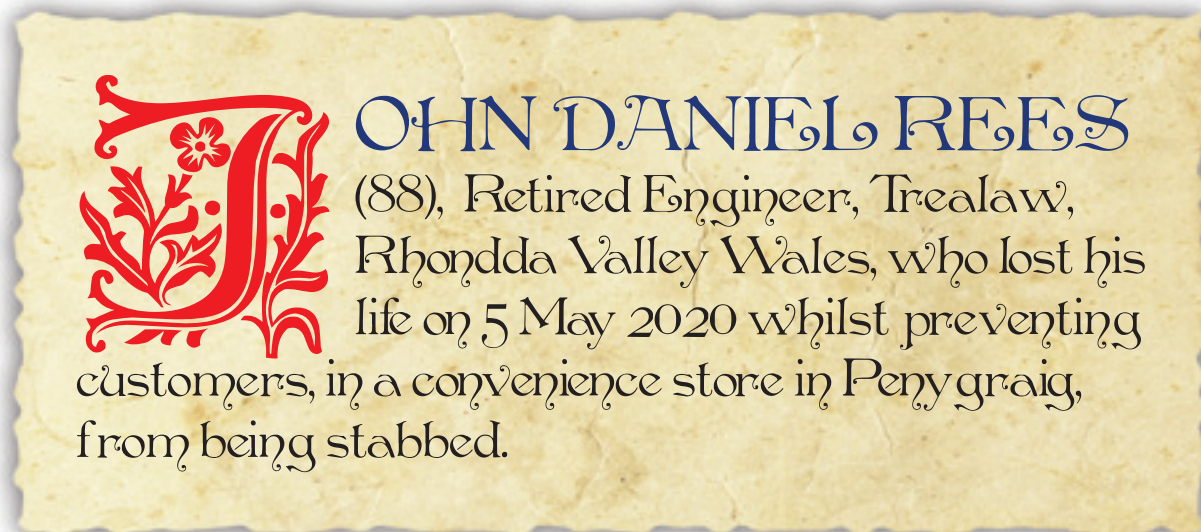
The Roll of Honour is kept in the Birthplace Museum, where the first volume is on constant display. Individual requests regarding viewing of specific entries are subject to the same procedure as above.

The Story of the Carnegie Roll of Honour

Every Hero whom the Trust has recognised since its establishment in 1908 has their name hand inscribed in the Roll of Honour. This is a beautifully illustrated book which contains over 7,000 names and consists of 4 volumes. In 2021 we published a booklet telling the story of the Roll of Honour, which was sent out to all our beneficiaries. The booklet is also available on our website and in the Andrew Carnegie Birthplace Museum.



Entry in the Roll of Honour of the Carnegie Hero Fund Trust, Dunfermline



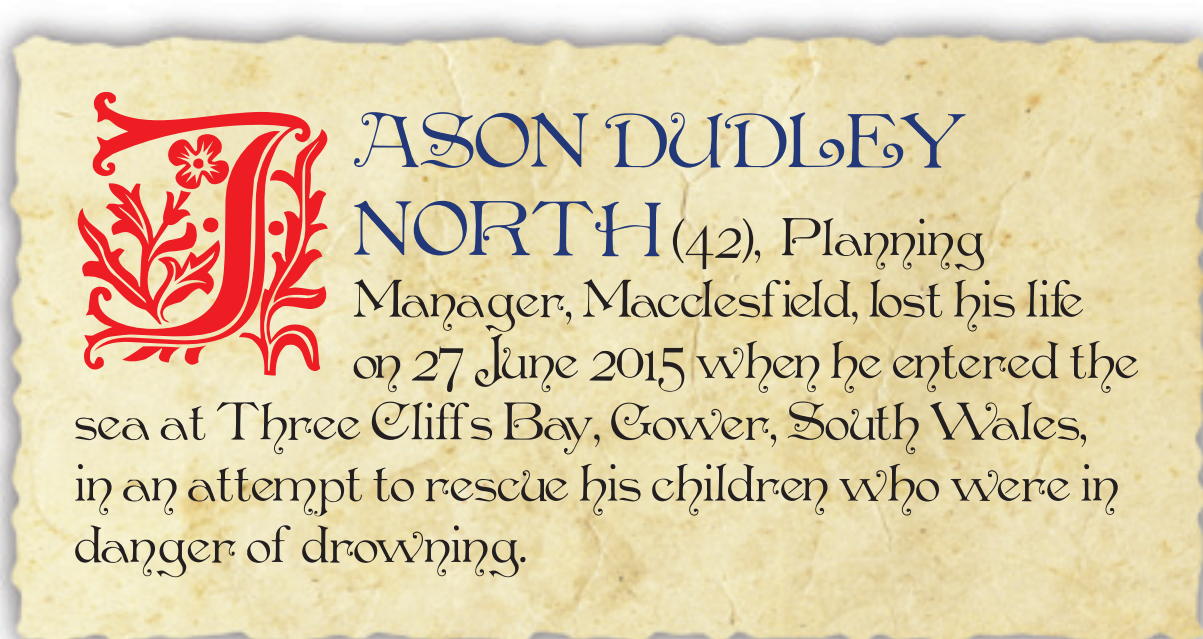
Citation

On 5 May 2020 at approximately 1:50pm, John Rees was shopping in the Co-op store in Penygraig while his wife was waiting for him in his car nearby. When he was at the shop counter, a woman, suffering from schizophrenia, brandishing a knife, entered the shop and threatened to stab two female customers. She then attacked one of the women. John stepped forward to intervene, grabbed the attacker's arm which was holding the knife and put himself in between the attacker and victim allowing her to escape. The attacker then turned on John, who lost his balance and fell. Two other customers came to his aid but were forced to withdraw when they themselves were threatened. John died at the scene.

Regardless of possible risks to his own safety, John acted with immense courage and, without hesitation, stepped in to protect other members of the public who were not known to him. His heroic actions saved the lives of at least two people.

The heroism of John Rees has been recognised as falling within the scope of the Carnegie Hero Fund Trust. His name will be inscribed in the Roll of Honour, his family will receive a posthumous certificate and the Trustees will maintain a continuing interest in their welfare.

Entry in the Roll of Honour of the Carnegie Hero Fund Trust, Dunfermline



Citation

On 27th June 2015 Jason North was spending the day with his wife and two children at Three Cliffs Bay, Gower in South Wales. He was watching his children from the water's edge while they played on their paddleboards.

Noticing that they were getting into difficulty and fearing for their safety, Jason entered the water just as his daughter managed to reach the shore. She followed Jason back into the water to help. Jason being fully clothed, became exhausted by his efforts and was swept underwater by the current. His daughter managed to reach her brother and they were both subsequently pulled out by others on the beach. Jason was brought ashore, unconscious. Despite attempts to resuscitate him by doctors who were at the scene, he remained unresponsive and was taken to Morriston Hospital where he was, tragically, pronounced dead. Fortunately, neither of the children were seriously injured.

The heroism of Jason North has been recognised as falling within the scope of the Carnegie Hero Fund Trust and reflects the caring and protective approach which governed his actions in his life. His name will be inscribed in the Roll of Honour and his family will receive a posthumous certificate and the Trustees will maintain a continuing interest in their welfare.

The Trust's Work

Our Criteria

The purpose of the Carnegie Hero Fund UK is to recognise acts of civilian heroism and provide support and financial assistance, if required, to injured heroes or the dependants of the heroes who have lost their lives while attempting to save another human life.

1. We only recognise adults over 18 years of age.
2. The act of heroism must have occurred in Great Britain, Ireland, the Channel Islands, or in the surrounding territorial waters.
3. We only recognise heroic acts that save, or attempt to save, human life in peaceful pursuits.
4. The heroic act must have been voluntary and have involved risk to the rescuer's life. We will only recognise cases where the hero has died or has suffered life changing injuries.
5. In some occupations (e.g. the emergency services), the ordinary discharge of duty involves risks, and such risks cannot in general be regarded as voluntary and would fall out with our scope. However, the Trustees are prepared to consider cases in which the nature of the rescue effort exceeds any reasonable requirement of occupational responsibility.
6. An investigation will be carried out on all potential cases for consideration by the Trustees. This includes obtaining a report/statement from a member of the emergency services, coroner or procurator fiscal confirming that the rescue/attempted rescue involved risk to the rescuer's life.
7. Recognition of a case is at the sole discretion of the Trustees.

Notes

Each reported case of heroism is judged on its individual merit in accordance with the above criteria. On recognising a case, the Trustees will agree a financial provision and we will prepare a citation and certificate to be awarded at a presentation ceremony for the hero's friends and family. The name of the hero will be hand inscribed in the Hero Trust's Roll of Honour.

We will maintain a continuing interest in the welfare of the recognised hero and/or their family. If required, we will provide ongoing support to:

Heroes who have been injured.

The dependants of heroes who have died.

This support can be emotional and/or financial.

Carnegie Dunfermline Trust

Summary Statement of Financial Activities

For the Year Ended 31st December 2021

	Total Funds 2021 £	Total Funds 2020 £
Income and endowments from:		
<i>Grants and donations</i>	14,099	31,793
<i>Other trading activities</i>	8,742	5,207
<i>Investments</i>	457,572	404,304
	<hr/>	<hr/>
Total Income	480,413	441,304
	<hr/>	<hr/>
Expenditure on:		
<i>Raising funds</i>	50,721	47,164
<i>Charitable activities</i>	724,590	451,111
	<hr/>	<hr/>
Total Expenditure	775,311	498,275
	<hr/>	<hr/>
Net expenditure before net gain/(loss) on investments	(294,898)	(56,971)
	<hr/>	<hr/>
<i>Net gain/(loss) on investments</i>	1,257,050	(103,521)
	<hr/>	<hr/>
Net income/(expenditure) and net movement in funds	962,152	(160,492)
	<hr/>	<hr/>
Reconciliation of Funds		
Balances brought forward	16,857,629	17,018,121
	<hr/>	<hr/>
Balances carried forward	17,819,781	16,857,629
	<hr/>	<hr/>

Carnegie Dunfermline Trust

Balance Sheet

As at 31st December 2021

	Total Funds 2021 £	Total Funds 2020 £
Fixed Assets:		
Tangible assets	1,249,050	1,313,154
Heritage assets	1,171,980	700,169
Investments	13,980,160	13,083,020
	<hr/>	<hr/>
Total Fixed Assets	16,401,190	15,096,343
	<hr/>	<hr/>
Current Assets:		
Stock	11,046	13,793
Debtors	42,503	23,394
Cash at bank and in hand	1,493,315	1,821,399
	<hr/>	<hr/>
Total Current Assets	1,546,864	1,858,586
	<hr/>	<hr/>
Current Liabilities:		
Creditors: Amounts falling due within one year	128,273	97,300
	<hr/>	<hr/>
Net Current Assets	1,418,591	1,761,286
	<hr/>	<hr/>
Net Assets	17,819,781	16,857,629
	<hr/>	<hr/>
The Funds of the Charity:		
<i>Unrestricted funds:</i>		
General	709,660	688,957
Designated	127,011	411,993
	<hr/>	<hr/>
Total unrestricted funds	836,671	1,100,950
<i>Restricted funds:</i>	6,957	-
	<hr/>	<hr/>
<i>Endowment funds:</i>		
Expendable endowment	16,976,153	15,756,679
	<hr/>	<hr/>
	17,819,781	16,857,629
	<hr/>	<hr/>

The summary accounts were approved by the Trustees on 28th April 2022 and signed on their behalf by:

Fiona Robertson – Chair

David Walker – Finance Convener

The summary accounts are taken from the audited 2021 full accounts of the Carnegie Dunfermline Trust. The auditor's opinion on those accounts was unqualified. The summary accounts may not contain enough information for a full understanding of the financial affairs of the Trust. Copies of the full accounts may be obtained free of charge on request from the Chief Executive, Andrew Carnegie House, Pittencrieff Street, Dunfermline.

Carnegie Hero Fund Trust

Summary Statement of Financial Activities

For the Year Ended 31st December 2021

	Total Funds 2021 £	Total Funds 2020 £
Income and endowments from:		
<i>Donations</i>	246,142	100
<i>Investments</i>	198,890	175,929
Total Income	445,032	176,029
Expenditure on:		
<i>Raising funds</i>	27,149	25,685
<i>Charitable activities</i>	198,145	188,828
Total Expenditure	225,294	214,513
Net expenditure before net gain/(loss) on investments	219,738	(38,484)
<i>Net gain/ (loss) on investments</i>	351,252	(30,473)
Net income/(expenditure) and net movement in funds	570,990	(68,957)
Reconciliation of Funds		
Balances brought forward	6,337,879	6,406,836
Balances carried forward	6,908,869	6,337,879

Carnegie Hero Fund Trust Balance Sheet

As at 31st December 2021

	Total Funds 2021 £	Total Funds 2020 £
Fixed Assets:		
Tangible assets	144,858	148,922
Investments	6,086,826	5,740,103
Total Fixed Assets	6,231,684	5,889,025
Current Assets:		
Debtors	7,807	7,165
Cash at bank and in hand	700,069	458,393
Total Current Assets	707,876	465,558
Current Liabilities:		
Creditors: Amounts falling due within one year	30,691	16,704
Net Current Assets	677,185	448,854
Net Assets	6,908,869	6,337,879
The Funds of the Charity:		
<i>Unrestricted income funds</i>		
General	359,016	193,868
Designated	75,782	8,782
Total unrestricted funds	434,798	202,650
Endowment funds:		
Expendable endowment	6,474,071	6,135,229
	6,908,869	6,337,879

The summary accounts were approved by the Trustees on 28th April 2022 and signed on their behalf by:

Fiona Robertson – Chair

David Walker – Finance Convener

The summary accounts are taken from the audited 2021 full accounts of the Carnegie Hero Fund Trust. The auditor's opinion on the full accounts was unqualified. The summary accounts may not contain enough information for a full understanding of the financial affairs of the Trust. Copies of the full accounts may be obtained free of charge on request from the Chief Executive, Andrew Carnegie House, Pittencrieff Street, Dunfermline.

Trustees and Staff



Annie Leverton (centre-left) and Kirke Kook's (centre-right) farewell party with Gillian Taylor and Janet McCauslin

Christina Traynor joined the team in July and Jonathon Cairney started in October, both in roles as Museum Assistants.



Christina Traynor

During the year the Trust welcomed four new Trustees: Thomas Docherty, Rachel Doyle, Victoria Simpson and Dr Ruth Strain.

The Trust was joined by student intern, Chloe Dunbar who conducted her final year placement at the Trust. Chloe's placement was over 6 months and she has maintained a connection with the Trust as one of our Young Ambassadors.

There has been a lot of change at the Andrew Carnegie Birthplace Museum with the departure of Museum Assistant, Gordon Robertson in May; Visitor Services Officer, Annie Leverton and Museum Manager/ Curator, Kirke Kook both in August; Museum Assistant, Helen Stroud in September and Learning & Access Officer, Lynsey Anderson in December after her return from Maternity Leave in October. Museum Assistant, Beth Cameron retired in December after working at the museum for 15 years.



Jonathon Cairney

In November Christina moved into the role of Visitor Services Officer. Jennifer Jones and Mark Macleod were appointed as the new Museum Managers in September in a job-share role.

Board of Trustees

Trustees

Andrew W Croxford BA CA FCCA
 Dr Colin Firth
 Gillian Mann
 Danny McArthur BSc MSc MRICS MaPS
 Janet McCauslin MBE
 George Murray
 Mike Reid
 The Rev. MaryAnn R Rennie
 Fiona Robertson MSc MCSP
 J Douglas Scott BA
 David M Walker BA CA FCCA
 Ian M Wilson BSc
 Thomas Docherty
 Rachel Doyle
 Victoria Simpson
 Dr Ruth Strain

Vice-Chair
Hero Fund Convener

Chair

Appointed June 2021
Appointed June 2021
Appointed June 2021
Appointed June 2021

Trustees appointed by Fife Council

ClIr Helen Law
 ClIr Tony Orton
 ClIr Derek Glen

Administration

Gillian Taylor
 Chiene & Tait
 Royal Bank of Scotland plc
 Brooks MacDonald
 J R Stevenson & Marshall
 Borland Insurance

Chief Executive
Auditors
Bankers
Investment Advisers/Managers
Legal Advisers/Solicitors
Insurance Advisers

Acknowledgements

With our additional thanks for photographs and contributions to:

Jim Payne	St Ninian's Church
Warren King	Archaeology Scotland
Douglas Scott	West Baptist Church
Carnegie Corporation of New York	Fire Station Creative
Hamilton & Inches	Fife Council Justice Social Work
Dunfermline Photographic Association	Safe Space
Fife Dunfermline Printmakers Workshop	Plastic-free Dunfermline
Commercial Primary School	Dunfermline Junior Chorus
Dunfermline Water Polo Club	Dunfermline Tennis and Bridge Club
Dunfermline Carnegie Cricket Club	Colin Firth

Ardroy on Tour Experience





New Museum Guidebook



Carnegie Dunfermline Trust

Andrew Carnegie House
Pittencrieff Street
Dunfermline
KY12 8AW

T: 01383 749789

E: admin@carnegietrust.com

W: www.carnegiedunfermlinetrust.org.uk

f @carnegiedunfermlinetrust

The Trust obtained a Royal Charter in 1919
Scottish Charity Number SCO 15710



Carnegie Hero Fund Trust

Andrew Carnegie House
Pittencrieff Street
Dunfermline
KY12 8AW

T: 01383 723638

E: herofund@carnegietrust.com

W: www.carnegiehero.org.uk

The Trust obtained a Royal Charter in 1919
Scottish Charity Number SCO 00729



Andrew Carnegie Birthplace Museum

Moodie Street
Dunfermline
KY12 7PL

T: 01383 724302

E: info@carnegiebirthplace.com

W: www.carnegiebirthplace.com

f **t** @carnegiemuseum

ISBN 0 947559 22

FOOTEPRINT DESIGN & PRINT 01835 862667