

**Scottish Local History Forum
Trustees' Annual Report and Financial Statements**

For the year ended 31 July 2025

Report of the Trustees

The Trustees of Scottish Local History Forum submit their report and accounts for the year ended 31 July 2025.

Steve Connelly	Hon Chair
Jan Bateman	Hon Treasurer
Andrew Jones	Hon Secretary
Don Martin	
Linda Riddell	
Jamie Sutherland (until October 2024)	
Alison Rosie	
Phil Back (co-opted September 2024)	
Bill Diack (co-opted September 2024)	

Contact address

Official Mailbox

Scottish Local History Forum
Box 103
12 South Bridge
Edinburgh
EH1 1DD

Treasurer

Scottish Local History Forum
20/2 Corstorphine Road
Edinburgh EH12 6HP

Bankers

Bank of Scotland
162a Fenwick Road
Giffnock
Glasgow
G46 6XF

Independent Examiner

Eric J Brown retired solicitor, ATII,CA
14 Liberton Drive Edinburgh EH16 6NN.

Governing Document

Scottish Local History Forum is a charitable unincorporated association and its purpose and administration arrangements are set out in the constitution. The constitution was adopted on 3rd September 1994 and last amended on 25th October, 2021.

The Forum is managed by a committee of Trustees who are appointed at the Annual General Meeting (AGM) of the Forum.

The aim of The Forum is to promote the study of Scottish local history without distinction of political, religious or other opinions. It meets this aim by:

- (a) associating historical and heritage societies, museums, archives, libraries, educational institutions and individuals interested in local history
- (b) stimulating public interest through meetings, outings, publications, newsletters, exhibitions, conferences, social media, website, prizes and awards.

Recruitment and Appointment of Trustees

Scottish Local History Forum is a registered charity in Scotland. Trustees are elected at the AGM which shall be held no earlier than 1 August and no later than 30 November each year. Members elect a minimum of 6 and a maximum of 12 Trustees to serve for the next year. They retire at each AGM but may stand for re-election. Consultation with representatives of member societies is achieved through an Advisory Committee (nominated by the member societies and elected at the AGM) which meets twice a year.

Management

The Trustees are responsible for the strategic direction and governance of the Forum. The Trustees Committee met 4 times via video conferencing in the year to 31st July 2025.

A new committee structure was established from March 2011, with various smaller sub-committees and working groups formed as required to focus on particular topics. Sub-committees' members are Trustees and/or volunteer members. The Trustees may also appoint an Editor, Assistant Editor, Membership Secretary, Events Organiser, Minute Secretary, Website editor, E-Newsletter editor and other positions which they may consider necessary for the efficient operation of the Forum. The sub-committees active during the year were:

- **Advisory Committee** (providing input and advice to the Trustees from member societies).

The Advisory Committee consists of:

- Murray Cook (Stirling Council)
- Sandra Purves (Broughton History Society)
- Ian Shearer (Friends of Kinneil)
- Ian Copland (Cupar Heritage)
- David Oswald (LOCSCOT) (from December 2024)
- Scott Broadfoot (LOCSCOT) (until December 2024)
- Iain Duffus (Edinburgh Libraries)
- Patrick Hart (National Library of Scotland)
- Derrick Johnstone (The Old Edinburgh Club)
- Lucy Dean (University of the Highlands and Islands)
- Eleni Koumpouzi (Scottish Community Heritage Alliance) (from May 2025)

Activities and Achievements

The financial results for the year are set out in the attached accounts.

The Paul Bishop Prize for the best article to appear in *Scottish Local History*, the journal of the Scottish Local History Forum, was awarded to David Smale, for 'The Incidence of Escapes from Stobs Prisoner of War Camp, 1915-1918' in issue 118. The award was kindly sponsored by Birlinn Ltd. Three colour issues of the journal were produced during the year. Don Martin continued as Editor.

Six e-newsletters were despatched to members by email and were also available for download by the public from the Forum's website. Steve Connelly acted as editor assisted by James Kennedy, Linda Clark and Andrew Jones. Regular contributors were Jocelyn Grant, National Records of Scotland; Marissa Trimble, Scottish Council on Archives and Chris Fleet, National Library of Scotland Map Library.

The Forum continues to offer its service to member societies of promoting, taking orders and online payments for their publications on our website. We currently offer 106 publications and/or books for sale. This includes a number of books bequeathed to the Forum by a former member (and previous Trustee) George Dixon.

The Forum continues to host the online Directory for Scottish Local History Resources on its website and now has 271 (267 last year) organisations listed.

Our Facebook page continues to improve our visibility and currently has 5024 followers (5100 last year). In the 4 weeks to 04/09/25 we reached 337 people.

The membership figures have increased compared to last year (in brackets) with, as at the end of August 2025, 224 (205) individual, 6 (6) student, 1 (5) complimentary, 2 (2) honorary and 106 (102) organisational members. Note: a year's complimentary membership is given to speakers at our conferences if they are not already members, but no conference was held last year. Authors also receive a complimentary copy of the issue of *Scottish Local History* containing their article.

On 22 May 2025 the Forum held a Walk and Talk event in Linlithgow, with 15 attendees ably guided by our secretary, Andrew Jones. A full report on the event is included in issue 122 of *Scottish Local History*.

The 2024 AGM was held online (via Zoom) on 28 October.

Following on from the recommendations of the review held in March 2024 a number of initiatives have been progressed by the Trustees. These include a great deal of work on marketing the Forum. We are grateful to new Trustee, Phil Back, for taking the lead on this aspect of the Forum's work. We agreed to place an ad in the National Trust for Scotland's magazine to promote the Forum (and hopefully increase membership). A working group (consisting of Trustees Jan Bateman and Linda Riddell along with former Scottish Records Association Editor, Carol Parry) met on 13/2/25 to look at how the role of Editor of the SLHF Journal might be organised in the future, and to consider a migration path to that state ready for when Don Martin decides to retire. The Trustees Identified a number of new roles to provide additional capacity to undertake the work of the Forum. Advertisements were placed for volunteers (Membership Administrator, Trustees, Outreach Officers, and Book Review Editor) with the Edinburgh Volunteer Centre. Already, we have appointed a new Membership Administrator, Carol Ettershank, to take over this role from Linda Riddell. We are grateful to Linda for taking on this task. An appointment of a Book Review Editor is also expected shortly.

Trustee Remuneration and Expense

The Trustees did not receive any remuneration during the year but did receive reimbursement of £3155.34 for expenses incurred as a direct result of Forum business (the largest of which was for £2313 for placement of the ad in NTS magazine). As meetings were held online there were no expenses paid for travel to meetings.

Reserves Policy

The Forum's current policy on reserves is to have funds equivalent to the costs of producing two issues of the Journal and holding an EGM.

Financial Review

The results for the period are set out in the attached accounts which show a surplus of £5163.17 (2024 deficit of £3981). This includes an overpayment by HMRC in relation to Gift Aid of £5070 which we reported to them and they advised us that they will recover from future Gift Aid claims.

Revenue for the year was significantly up for the year at £23677.56 (2024 - £12,820) due to the Gift Aid claim (for 4 years), an increase in membership and the erroneous Gift Aid payment. Expenditure was also up at £18514.39 (2024 - £16,801) – last year's was inflated due to the c£2,000 expenditure incurred by the strategy workshop and this year's is inflated by the cost of the advert in NTS magazine. The costs of journal production continue to increase slightly and postage costs significantly. We have included the revenue we obtain for post and packaging for website sales of books and journals in with revenue for journals). The fees charged and deducted automatically by paypal on all website sales including membership and events have been covered by the accumulated revenue for post and packaging from previous years (which has not been accounted for previously). Next year we shall show the paypal fees separately.

The Forum still ended the financial year with very healthy bank balance/ reserves of £31,348.73 (compared with £26185 in 2024). Note: the bank balance at the beginning of this Financial Year has been adjusted to include transfer of PayPal income for 1/1/24 to 31/6/24 of £1242.46 which did not actually hit the bank account until the current Financial Year but were considered included

in the income for the previous year as it was in the PayPal account at that date. Making an opening balance of £26185.56. Similarly, the same adjustment is made to the bank balance at the end of the current financial year (£28,358.63) to allow for £1,534.50 transfer of PayPal income from 1/1/25 to 31/6/25 and some cheque payments for services used during the year which did not hit the bank account until early September.

Plans for the Future

Governance

- Implementing the actions from the Planning/ strategy workshop
- Hold the 2025 AGM online on 27 October
- Appointment of a Book Review Editor as an initial step in how the Journal will be managed going forward
- Appointment of Outreach Officers and Social Media Officer to raise profile of the Forum and attract additional members
- Appointment of additional Trustees.

Publications

- three issues of Scottish Local History in Autumn 2025 and Spring and Summer 2026
- five or six issues of the e-newsletter.

Events

- The annual conference "Popular Protest in a Scottish Local History Context" on Saturday, 25 October 2025 at the Wynd Centre, Paisley;
- A Walk and Talk in Spring 2026 (venue to be decided)

Expanding the membership

- Activities as suggested by the planning/ strategy workshop.

Recruitment of more volunteers

- Identify suitable candidates to assist with the work of the Forum

Approved by the Trustees and signed on their behalf by:

.....
Steve Connelly, Honorary Chair

.....
Date

Independent Examiner's Report to the Trustees of Scottish Local History Forum

I report on the accounts of the charity for the year ended 31 July 2025 which are set out on pages 7 and 8.

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. The charity trustees consider that the audit requirement of Regulation 10(1) (d) of the 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 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:

- 1 which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with Section 44(1)(a) of the 2005 Act and Regulation 4 of the 2006 Accounts Regulations; and
 - to prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 Accounts Regulations;
- 2 to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Eric J Brown (Retired Solicitor), ATII,CA
14 Liberton Drive Edinburgh EH16 6NN.

Date

ANNUAL REPORT ACCOUNTS
Year ending 31/7/2025

	2025	2024
Receipts		
Subscriptions	10,692.00	10,150
Proceeds of events	378.00	0
Sale of journals	404.50	612
Book sales	67.99	143
Prize sponsorship	100.00	100
Advertising income	100.00	185
PLS licensing fees	2,476.65	1,543
Miscellaneous income	0.00	100
Donations	0.00	87
Gift Aid	9,458.42	0
Total Receipts	23,677.56	12820
Expenses		
Website/Post box/ Directory	2,678.80	2,295
Journal production incl postage	12,161.85	12,113
Book royalties and commission	309.97	176
Events	0.00	283
Administration	383.47	110
Insurance	90.00	90
Prizes awarded	100.00	0
Other	2,790.30	1,734
Total Expenses	18,514.39	16,801
Surplus/(deficit) for year	5,163.17	-3,981

Statement of Balances
As at 31 July 2025

	2025	2024 £
Bank and Cash in hand		
Opening balances	26185	30260
(Deficit)/Surplus for year	5163	(3981)
	<hr/>	<hr/>
	31348	26185
Funds		
Unrestricted funds	26278	
Restricted funds (debt to HMRC)	5070	
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Approved by the trustees and signed on their behalf by:

.....
Steve Connelly, Honorary Chair

.....
Date