

# Breadalbane Heritage Society



*Founded 1962*



*Cluny Gardens: Trillium erectum*

## **Report and Accounts for the Period Ended 31 August 2025**

**Charity Number: SC049382**

# **Trustees' Annual Report**

## **For the Period Ended 31 August 2025**

The Trustees have pleasure in presenting their report together with the financial statements and the independent examiner's report for the period 1 September 2024 – 31 August 2025.

### **Reference & Administrative Information**

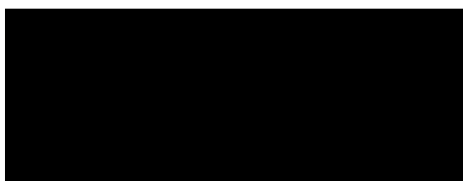
#### **Charity Name**

Breadalbane Heritage Society

#### **Charity Number**

SC049382

#### **Address**



#### **Address for correspondence**

*as above*

#### **Trustees during the period**

Frances Stamford Gillespie

Jennifer Linda Rees

Harriet Sarah Rose

Ian Alistair Stewart

Lesley May Whitwood

Neil Stewart Hooper (Honorary President)

#### **Bankers**

Bank of Scotland,  
PO Box 1000,  
BX2 1LB

#### **Independent Examiner**

Mrs Linda El-Ghorr, ACMA, MBA,



## **Trustees' Annual Report**

### **Structure, Governance & Management**

#### **Constitution**

Breadalbane Heritage Society's governing document is a Constitution. The Society was established formally on 13 June 2019 as a SCIO in terms of the Charities and Trustee Investment (Scotland) Act 2005.

#### **Appointment of Trustees**

The first Trustees of the Society were appointed at the inception of the SCIO and formed the Interim Board. Those Trustees on the Interim Board retired at the first Annual Members' Meeting (AMM) in March 2021, and all were re-elected. Thereafter, as it is set out in the Constitution, one quarter of the Trustees have retired each year. At the fifth AMM in November 2024, Nick Grant resigned, Lesley Whitwood retired and was re-elected for a third term, and Jenny Rees was elected to the Board.

#### **Management**

The Society is managed by the Board of Trustees who meet four times a year. During the pandemic the Board meetings took place on Zoom; however they have all taken place "in person" during the year 2024-2025. During this period individual Trustees have undertaken the following roles:

**Chairman:** Lesley Whitwood

**Treasurer & Membership Secretary:** Harriet Rose

**Programme Secretary:** Ian Stewart

**PR & Media:** Fran Gillespie

### **Objectives & Activities**

#### **Charitable purposes**

The charitable purposes of the Society are to advance education, heritage and culture by:

- promoting and encouraging an interest in the study of the archaeology, history, antiquities, folk-lore and natural history particularly concerning the Breadalbane and Upper Tay area of Perthshire;
- preserving, conserving, understanding and interpreting, within the national context, the historical and cultural heritage of the area;
- providing a community resource through the collection, classification and conservation of items of local historical interest;
- promoting and advancing heritage in the area as a source of pride and to address heritage issues affecting the area.

## Trustees' Annual Report

### Chairman's Report

This has been another successful year for the Breadalbane Heritage Society with healthy membership numbers and many interesting activities. The committee members have risen to the challenge of making sure that all activities run smoothly. We remain especially grateful to Ian Stewart for his tireless work with the programme planning, the website, the recording and technical management of meetings and overseeing the maintenance of Killiechassie graveyard.

**Membership** numbers have fluctuated slightly over the past three years. In July 2025 BHS had a total of 114 members whereas we had 96 members in July 2024, and 113 members in July 2023. Winter meeting attendance in 2024-2025 varied between 42 and 93 individuals (members/visitors) with the highest attendance for the meeting about Scotland's Rock Art in February 2025 (on Zoom).

### Talks and Outings

It has been the practice to link the talks to some of the summer activities and to put the recorded talks on the website for those who could not be at the live sessions. Again, we thank Ian Stewart for this task which has often taken many hours of work.

Local people have been intrigued by the developments in **Taymouth Castle**, and the **September** talk gave an insight into the restoration work which has been carried out there.

**October's** talk fired our enthusiasm for the discovery of the bridges connected to **Wade's roads**; we were unable to have that planned summer walk this season, but we hope to take up the option in 2026.



The talk in **February** about **rock art** added to our knowledge of the sites which have been discovered and those which may reveal other insights when they can be further investigated. It also prompted members to take part in excavations in the area organised by Perth and Kinross Heritage Trust in September.



## Breadalbane Heritage Society

2024-25 PROGRAMME  
WINTER TALKS



**Friday 20<sup>th</sup> September 2024**  
 The restoration work at the Taymouth Castle with specific reference to stained glass and decorative ceiling works:  
 Mairi McAdam and specialist contractors

**Friday 18<sup>th</sup> October 2024**  
 The Military Bridges of Wade and Caulfeild: Colin Liddell

**Friday 15<sup>th</sup> November 2024**  
 Ardrasgairt 19th century Social History: Keith Myers

**Friday 17<sup>th</sup> January 2025**  
 Dumfries and Galloway HES Properties: (by Zoom)  
 Stefan Sagrott, Senior Cultural Resources Advisor, HES

**Friday 21<sup>st</sup> February 2025**  
 Rock Art (by Zoom): Dr. Joana Valdez-Tullett, specialist in Art Rock, involved with Scotland's Rock Art project.

**Friday 21<sup>st</sup> March 2025**  
 Springtime in Cluny: John Mattingley, linked to a visit to the Cluny Gardens in May 2025

**All talks 'in person' and on Zoom start at 7.30 p.m.**  
 Breadalbane Community Campus, Aberfeldy: Doors open at 7.00 p.m.  
**Admission: No charge for Society Members; Visitors—£5.00**  
 For details of the Zoom talks, contact Ian at [bhsaberfeldy@gmail.com](mailto:bhsaberfeldy@gmail.com)  
 Breadalbane Heritage Society, Scottish Charitable Incorporated Organisation, SC049382

We were however able to follow up John Mattingley's **March** talk about **Cluny Gardens** (see cover photo) with a well-attended visit in good weather in May, ably guided by Wendy and John.





*Wanlockhead Lochnell Mine*

The **January** talk prepared us for the multi-day trip in August to **Dumfries and Galloway**. We travelled via Wanlockhead lead mine museum to the Ernespie House Hotel at Castle Douglas where we stayed for three nights.

There is an intrepid group of about 18 members who join these four-day trips, again carefully researched by Ian Stewart.

On Wednesday we visited the Iron Age roundhouse and the Whithorn Trust Museum, the Whithorn Priory and the stone crosses HES Museum. From there, we then went our separate ways to find other sites including St. Ninian's Chapel at Isle of Whithorn.



*Whithorn Trust Iron Age Roundhouse*

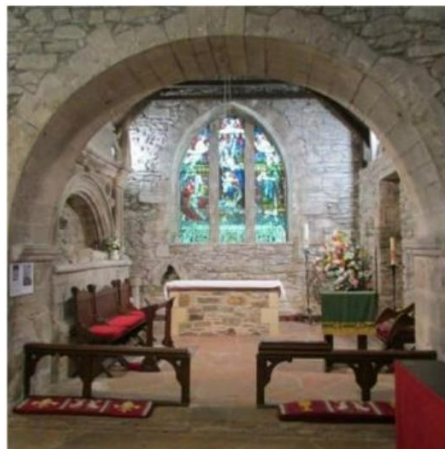


*HES Crosses Museum*

Thursday took us to Dundrennan Abbey and then to Kirkcudbright where we visited Greyfriars Episcopal Church. We were glad to find a kneeler there celebrating the Wee Kirkcudbright centipede, a song which Susan had invited us to sing at the previous evening's supper! Some members also went to Broughton House and Gardens. The afternoon's heavy rain limited some of our travels, and there were so many places to visit that we could not do all of them.



*HES Dundrennan Abbey*



*Greyfriars Episcopal Church, Kirkcudbright*



*HES Lincluden Collegiate Church*

On the way home on Friday groups found their own places to visit: my car passengers went to Lincluden Church before returning to Aberfeldy.

In **May** Society members were invited to see the **excavations along the A9** and a group took a walk to see what had been uncovered during the preparation for A9 dualling near Ballinluig.

Another summer visit in the local area took us to the **Glenlyon Tweed Mill** behind the vets – many of us never knew it was there!



*Glenlyon Tweed Mill, Aberfeldy*



*Murthly Castle*

We also visited **Murthly Castle and Chapel** by kind invitation of Thomas Steuart Fotheringham and enjoyed a guided tour of the Castle and a visit to the Chapel.

## Other Activities

- ❑ One of the successes of the year has been the updating and reprinting of the “Around Aberfeldy” booklet as we had sold out of the previous issue. The historical information has not changed but since 2008 there have been a number of changes, not least of which has been the opening of the Cinema. These are now on sale in various outlets and provide a valuable source of income for the Society.
- ❑ Yet again we continued our association with the Breadalbane Academy. Fran Gillespie joined them on their visit around the area sponsored by Taymouth Castle and the Society awarded prizes for the follow up work done by the students.
- ❑ The website brought a number of queries which we have tried to follow up, and Helen Stewart continues to offer assistance with family history research.
- ❑ Our website information also prompted a donation of a document from the 3rd Battalion Breadalbane Fencibles, a temporary home-defence unit formed in 1793 during the French Revolutionary Wars. This handwritten book of poetry, epistles and shorthand relating to the period 1796 to 1813 was donated by David McKerrow from Edinburgh.

It has been a very busy year which has proved the interest and enthusiasm of the members of the Breadalbane Heritage Society in all matters pertaining to the area.

## Financial Review

The Society's annual income derives mainly from membership subscriptions, income from book sales and donations. Regular expenditure consists of: payments for room hire for meetings; fees paid to speakers; administrative expenses relating to the running of the Society; archive storage; subscription to the online platform for hosting meetings; subscription to the video platform for making recordings of meetings; and IT costs related to the website management. These costs are met broadly by the annual income.

The deficit in the **General Fund** for the period ended 31 August 2025 was £1,110, whereas in the period ended 31 August 2024 there was a surplus of £143. This deficit is attributed directly to the printing cost (£1,697) of 1000 copies of a revised version of the BHS publication "Around Aberfeldy". These booklets are provided to local outlets for a price of £3.50, with a recommended RRP of £5. Currently we are looking for additional outlets, and we anticipate selling 100 copies per annum, providing BHS with an annual income of £325. On this basis the printing cost should be recouped within approximately 5 years.

The deficit in the **Restricted Fund** in the period ended 31 August 2025 was £100, whereas in the period ended 31 August 2024 this deficit was £75. This £100 was spent on prizes for the Breadalbane Academy S2 History project which had been set up in 2024 in collaboration with the Taymouth Castle developers (Discovery Land Company) (*see below*)

## Restricted Funds

A new venture during the summer of 2024, in collaboration with the community liaison officer from the group developing Taymouth Castle (Discovery Land Company), was to join the S2 class at Breadalbane Academy for a tour of the historic sites of the local area. In that first year the Society awarded three prizes to the students for their follow up work, and we continued with this worthwhile and successful venture in 2025, increasing the number of prizes to four.

## Reserves Policy

The Trustees consider that reserves of £3,000 are needed to cover annual costs for a period of two years (£1,500 pa) in order to provide financial stability, supporting the operation of the Society and enabling it to continue to work towards its core purposes in the event of a reduction of annual income. This continues to be important given the uncertainty of future income from membership subscriptions and the cost of archive storage. Costs include: hosting of meetings (venue charge and speaker fees); IT and administration costs; website maintenance; annual subscriptions to the online meeting platform and to the video platform for access to recorded meetings; and annual subscriptions to national heritage bodies.

The Trustees intend to use the surplus in the General Fund (£3,700 as at 31 August 2025) to support the following:


- **Archive storage facilities:** While at present the Society has been allocated archive storage space within Aberfeldy Town Hall, for an annual charge of £360, this space will no longer be available from November 2025 as the upper floors of the Town Hall are being converted into residential accommodation. Options for archive storage space continue to be unclear and it is possible that additional expenditure will be required to provide suitable secure facilities.



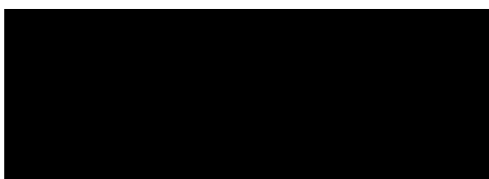
*(Reserves policy continued)*

- **Wade's Bridge Conservation:** As outlined in previous Reports, concerns have been raised regarding the current condition of the historic Wade's Bridge and what is needed to preserve it. This is a long term project with the overall goal of the Bridge restoration being completed by 2033 (the Bridge's Tercentenary). When it seems appropriate, Trustees intend that BHS will provide some financial support for this project.
- **Restoration of Black Watch Monument:** BHS has been approached by the Black Watch Association regarding a proposal for a joint venture, along with Perth & Kinross Council, to produce costings for repairs to the monument site. The intention is to approach funding bodies for support with a view to complete works in time for the 140<sup>th</sup> anniversary of the Black Watch in 2027. Trustees may consider it appropriate to provide some financial support for this project once it is further developed.
- **Fortingall Publications:** There are a number of publications "in the pipeline" in relation to the historic village of Fortingall, and the Society intends to support the production of these, although this may be a few years hence:
  - The publication of Oliver O'Grady's report on Fortingall excavations;
  - A guide to Fortingall cross slabs;
  - The reprint of "A Highland Parish", the history of the Fortingall area written by Alexander Stewart.

Signed on behalf of the Trustees



H S Rose (Trustee & Treasurer)



L M Whitwood (Trustee & Chairman)

Date: 23 October 2025



## Trustees' Annual Report

Statement of Receipts and Payments for the period 01 September 2024 to 31 August 2025

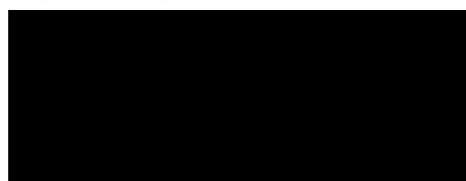
		Notes	General Funds £	Restricted Funds £	Total Funds Current Period £	Total Funds Last Period £
<b>Receipts</b>						
	Subscriptions		1,184		1184	992
	Visitors' fees		255		255	380
	Donations	<b>4</b>	142		142	144
	Fundraising	<b>5</b>	172		172	158
	Outing & trip fees	<b>6</b>	260		260	0
	Killiechassie	<b>7</b>	282		282	242
	Bank Interest		93		93	90
			2,388		2,388	2,006
<b>Payments</b>						
	Event expenses	<b>8</b>	360		360	410
	Fundraising expenses	<b>5</b>	1,697		1697	0
	Outing & trip expenses	<b>6</b>	260		260	0
	Killiechassie expenses	<b>7</b>	275		275	282
	Museum expenses	<b>9</b>		100	100	75
	General expenses	<b>10</b>	856		856	1,121
	Governance Costs	<b>11</b>	50		50	50
	Bank Charges		0		0	0
			3,498	100	3598	1,938
<b>Surplus/(deficit) for the year</b>			<b>(1,110)</b>	<b>(100)</b>	<b>(1,210)</b>	<b>68</b>

**Trustees' Annual Report****Statement of Balances as at 31 August 2025**

	Notes	General Funds  £	Restricted Funds  £	Total Funds Current Period  £	Total Funds Last Period  £
<b>Funds reconciliation</b>	<b>2</b>				
Opening cash & bank balance		7,885	3,378	11,263	11,195
Surplus/(Deficit) for the year		(1,110)	(100)	(1210)	68
<b>Closing cash &amp; bank balance</b>		<b>6,775</b>	<b>3,278</b>	<b>10,053</b>	<b>11,263</b>
<b>Assets</b>					
Recoverable grant re Killiechassie	<b>7</b>	275		275	282

The notes on pages 10 to 13 form an integral part of these accounts.

Approved by the Trustees on 23 October 2025 and signed on their behalf.



H S Rose (Trustee & Treasurer)



L M Whitwood (Trustee & Chairman)

## Trustees' Annual Report

### Notes to the Accounts for the period 01 September 2024 to 31 August 2025

#### 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. Restricted funds are those where a grant has been awarded for a specific purpose.

	At 31 Aug 2025 £	At 31 Aug 2024 £
<b>General Funds</b>	6,775	7,885
<b>Restricted Funds</b>	3,278	3,378
	<b>10,053</b>	<b>11,263</b>

All funds detailed in these notes are general funds unless otherwise indicated.

#### 3. Assets

Breadalbane Heritage Society has no assets with a value greater than £500.

## Trustees' Annual Report

### 4. Donations

	<b>General Funds</b>	<b>Restricted Funds</b>	<b>Total Funds Current Period</b>	<b>Total Funds Last Period</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
General donations	142			144
<b>Total</b>	<b>142</b>			<b>144</b>

### 5. Fundraising

	<b>Receipts</b>	<b>Payments</b>	<b>Surplus Current Period</b>	<b>Surplus Last Period</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Book Sales – around Aberfeldy	140	1,697	(1,557)	95
Book Sales – Cup Marked Stones	32	0	32	63
	<b>172</b>	<b>1,697</b>	<b>(1,525)</b>	<b>158</b>



## Trustees' Annual Report

### 6. Outings & trips

	Receipts £	Payments £	Net Current Period £	Net Last Period £
Outings	260	260	0	0
Total	<b>260</b>	<b>260</b>	0	<b>0</b>

### 7. Killiechassie Burial Ground

Grants totalling £10,000 were awarded to BHS in 2013 for the preservation and maintenance of the Killiechassie Burial Ground. This Fund is managed by Foundation Scotland and BHS draws down monies from the Fund retrospectively to cover the annual maintenance costs. The Fund value at 31 August 2025 was £6,749.94

During the year ended 31 August 2025 the total Killiechassie expenses were £275, which related to maintenance, and this is the amount that will be drawn down in October 2025 from the Foundation Scotland Fund.

### 8. Event expenses

	Total Current Period £	Total Last Period £
Speakers' expenses and gifts	200	250
Hire of Hall	160	160
	360	410

## Trustees' Annual Report

### 9. Restricted ("Museum") Fund

The payment of £100 in the current financial year related to the provision of prizes for the S2 History project. See above under Restricted Funds section of Financial Review.

### 10. General Expenses

	<b>Total Current Period £</b>	<b>Total Last Period £</b>
Subscriptions	200	200
Administration expenses	656	921
	<b>856</b>	<b>1,121</b>

Administration expenses include £360 which is the annual charge payable to Locus Breadalbane for storage facilities in the Town Hall.

### 11. Governance Costs 1

	<b>Total Current Period £</b>	<b>Total Last Period £</b>
Independent Examination	50	50
	<b>50</b>	<b>50</b>

### 12. Related party transactions

No remuneration has been paid during the year to any Trustee or connected person.

A total of £293 was paid to Trustees as reimbursement of expenses relating to purchase of IT related items and subscriptions, printer ink cartridges and stationery

**INDEPENDENT EXAMINER'S REPORT**  
**TO THE TRUSTEES OF BREADALBANE HERITAGE SOCIETY**  
**FOR THE PERIOD 01 September 2024 TO 31 AUGUST 2025**

I report on the accounts of the charity for the period 01 September 2024 to 31 August 2025 which are set out on pages 8 to 13.

**Respective responsibilities of trustees and examiner**

The trustees of Breadalbane Heritage Society are responsible for the preparation of the accounts in accordance with the terms of the Charities and Trustee Investment (Scotland) 2005 Act and the Charities Accounts (Scotland) Regulations 2006 (as amended). 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 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

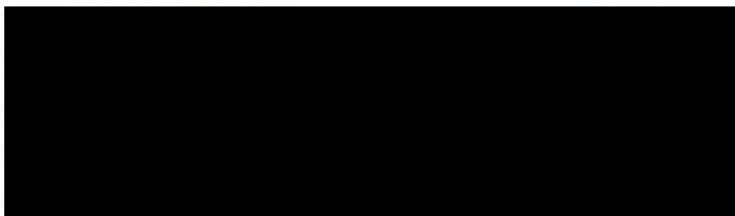
1. which gives me reasonable cause to believe that in any material respect the requirements:

- 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

have not been met, or

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

**Mrs L El-Ghorr ACMA**



Date 27/10/2025