

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

For the year ended 31 July 2026

Report of the Trustees

The Trustees of Scottish Local History Forum submit their report and accounts for the year ended 31 July 2026.

Steve Connelly	Hon Chair
Jan Bateman	Hon Treasurer
Linda Riddell	Hon Secretary
Don Martin	
Alison Rosie	
Phil Back	
Bill Diack (until October 2025)	
Claire Taylor (from October 2025)	
Julia MacDonald (from October 2025)	
Craig Statham (from October 2025)	
Caitlin Cameron-Ramsay (from October 2025)	
Jan Polley (from October 2025)	

Contact address

Official Mailbox

Scottish Local History Forum
Box 96
44-46 Morningside Road
Edinburgh
EH10 4BF

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 four times via video conferencing in the year to 31st July 2026.

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).
- **Marketing Committee**
- **Events Committee**

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)
- Iain Duffus (Edinburgh Libraries)
- Suzanna Beaupre (National Library of Scotland) (from October 2025)
- Derrick Johnstone (The Old Edinburgh Club)
- Lucy Dean (University of the Highlands and Islands)
- Eleni Koumpouzi (Scottish Community Heritage Alliance)

The Marketing Committee consists of:

- Phil Back
- Molly Comer
- Caitlin Ramsey
- Jan Polley

The Events Committee consists of:

- Steve Connelly
- Alison Rosie
- Craig Statham

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, during 2025 was awarded to Ali Erginsoy, Scotland's Quiet Industrial Revolution: The Lothians, 1822-1872 from [issue 122](#). The award was kindly sponsored by Birlinn Ltd.

Three colour issues of the journal were produced during the year. Don Martin continued as Editor and Claire Taylor acted as Book Review Editor and carried out some editing. Douglas Lockhart and Rosemary Morrison provided valuable assistance with the journal's production.

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, Andrew Jones and Linda Clark. Regular contributors were Jocelyn Grant, National Records of Scotland; Marissa Trimble, Scottish Council on Archives and Chris Fleet, National Library of Scotland Map Library.

A new weekly SLHF Substack posting of stories of Scottish local history interest has been created and sent out to subscribers since November 2025 due to the hard work and diligence of one of our Trustees, Phil Back.

The Forum successfully recruited a number of volunteers to assist with marketing and production of the Journal.

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 82 publications and/or books for sale. A number of books bequeathed to the Forum by a former member (and previous Trustee) George Dixon have also been sold on ebay as well as through the website.

The Forum continues to host the online Directory for Scottish Local History Resources on its website and now has 276 (271 last year) organisations listed.

Our Facebook page continues to improve our visibility and currently has 5789 followers (5024 last year). In the 4 weeks to 02/09/26 we reached 973 people. Our new volunteer, Molly Comer, has been very effective in maintaining our Facebook presence.

The membership figures have reduced slightly compared to last year (in brackets) with, as at the end of August 2026, 220 (224) individual, 6 (6) student, 1 (1) complimentary, 1 (2) honorary and 101 (106) organisational members. Note: a year's complimentary membership is given to speakers at our conferences if they are not already members. These are not included in the above figures. Authors also receive a complimentary copy of the issue of *Scottish Local History* containing their article.

On 22 June 2026 the Forum held a Walk and Talk event in Stirling, with 25 attendees ably guided by our Advisory Committee member, Murray Cook.

The 2025 AGM was held online (via Zoom) on 27th October.

The Forum's Conference on Popular Protest was held in Paisley on 25th October and although well received, attendance was disappointing and the event made a loss.

A volunteer, Claire Taylor was recruited to act as Book Review Editor to assist Don Martin, the Editor. She also joined as a Trustee.

Our PO Box provider has closed its office on South Bridge, Edinburgh and we have been allocated a new PO Box in another Edinburgh location (Morningside).

Trustee Remuneration and Expense

The Trustees did not receive any remuneration during the year but did receive reimbursement of £898.20 for expenses incurred as a direct result of Forum business. 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 deficit of £3,646.57 (2025 surplus of £5163.17).

Revenue for the year was significantly down for the year at £14441.78 (2025 - £23,677.56) – last year's revenue was artificially inflated by the erroneous Gift Aid payment. No Gift Aid claim was made this financial year. We tend to submit a claim for several years at a time. We hope to make a claim in the next financial year 2026/7. Expenditure was about the same at £18,088.35 (2025 - £18,514.39). The fees charged and deducted automatically by paypal on all website sales including membership and events have been covered by the accumulated nett revenue for post and packaging from previous years (which has not been accounted for previously). The expenditure for the Paul Bishop Prize of £100 was late to be presented and will be reflected in the accounts for FY2026/7. The income (reimbursement by Birlinn who sponsor the prize) is however reflected in this year's accounts.

The Forum still ended the financial year with a healthy bank balance/ reserves of £27,702.16 (compared with £31,348.73 at the end of 2025). Note: the bank balance at the beginning of this Financial Year has been adjusted to exclude transfer of PayPal income for 1/1/25 to 31/7/25 of £1534.50 plus expenditure of £619.40 for cheques which did not actually hit the bank account until the current Financial Year but were included in the income/expenditure for the previous year. Similarly, the same adjustment is made to the bank balance at the end of the current financial year to allow for £665.45 transfer of PayPal income from 10/4/26 to 31/7/26 which did not hit the bank account until August.

Plans for the Future

Governance

- Appointment of a new Honorary Secretary to replace Linda Riddell who steps down in that role at the 2026 AGM
- Transfer of responsibility for marketing and volunteer management/support
- Hold the 2026 AGM online on 19 October
- Appointment of a Events Coordinator
- Appointment of additional Trustees.

Publications

- three issues of Scottish Local History in Autumn 2026 and Spring and Summer 2027
- five or six issues of the e-newsletter.

Events

- An annual conference in spring 2027 and possibly another in the autumn
- A Walk and Talk in Spring 2027 and possibly another in the autumn

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 2026 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 31/7/2026

	2026	2025
Receipts		
Subscriptions	9652.00	10,692.00
Proceeds of events	655.00	378.00
Sale of journals	561.50	404.50
Book sales	347.51	67.99
Prize sponsorship	100.00	100.00
Advertising income	0.00	100.00
PLS licensing fees	3098.77	2,476.65
Miscellaneous income	0.00	0.00
Donations	27.00	0.00
Gift Aid	0.00	9,458.42
Total Receipts	14,441.78	23,677.56
Expenses		
Website/Post box/ Directory	2,640.00	2,678.80
Journal production incl postage	12,907.84	12,161.85
Book royalties and commission	334.95	309.97
Events	1,250.00	0.00
Administration	634.08	383.47
Insurance	90.00	90.00
Prizes awarded	0.00	100.00
Other	231.48	2,790.30
Total Expenses	18088.35	18,514.39
Surplus/(deficit) for year	-3646.57	5,163.17

Statement of Balances
As at 31 July 2026

	2026	2025
		£
Bank and Cash in hand		
Opening balances	31348.73	26185
(Deficit)/Surplus for year	-3646.57	5163
	27702.16	31348
Funds		
Unrestricted funds	22632.16	26278
Restricted funds (debt to HMRC)	5070.00	5070

Approved by the trustees and signed on their behalf by:

.....
Steve Connelly, Honorary Chair

.....
Date