



Trustees' Annual Report for the period

	Period start date	Period end date
From	1 January 2024	To 31 December 2024

Section A Reference and administration details

Charity name Swaledale and Arkengarthdale Archaeology Group

Other names charity is known by SWAAG

Registered charity number (if any) 1155775

Charity's principal address c/o Michael Keenan
School House, Silver Street
Reeth
Richmond
North Yorkshire

Postcode

DL11 6SP

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Rod Flint	Secretary	Retired 21/11/2024	
2	Michael Keenan	Treasurer		
3	Jane Harrison		Retired 09/05/2024	

4	Barbara Colling	Retired 21/11/2024
5	Anne Jowett	
6	Hilary Fawcett	
7	Matthew Farrelly	Appointed 23/01/2024

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg trust deed, constitution)	Constitution
How the charity is constituted (eg trust, association, company)	Charitable Incorporated Organisation (CIO)
Trustee selection methods (eg appointed by, elected by)	Elected by ballot at the AGM, with interim options to co-opt, as per the Constitution

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

Organisational Structure: SWAAG is managed and controlled by the volunteer Trustees all of whom are elected from the membership. Specialist groups/committees reporting to the Trustees are formed as necessary

The policies in place include the following :
 Health and Safety
 Children and Young Peoples Safeguarding
 Financial Authority and Controls
 Diversity and Inclusion
 Volunteering
 Finds
 These policies are subject to periodic review

Section E of this report provides a statement explaining the Trustees' reserves policy for SWAAG.

Data Protection and Privacy continue to be managed in accordance with GDPR recommendations.

Summary of the objects of the charity set out in its governing document

For the *public benefit* to advance the education of the public in general and more specifically the residents of, and visitors to, the County of North Yorkshire, particularly the area known as the Yorkshire Dales, in the subjects of archaeology, history, heritage, geology and the natural environment in order to promote a better understanding and management of the local heritage by, for example:

Providing training and experience of a broad range of archaeological and historical investigative techniques which may be applied to the study of the local heritage;

Undertaking research including local history, fieldwork and excavations into all aspects of the local heritage and publishing and making otherwise available the results of that research;

Providing lectures, guided walks, community projects, activities with local schools and organisations and exhibitions.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The Trustees have had regard to the guidance issued by the Charity Commissioners on public benefit and, in accordance with that, the activities undertaken by SWAAG in 2024 have included :

- A group visit took place to the Roman Army Museum including a guided tour of Magna Fort which is located next to Hadrian's Wall near to Greenhead
- Preliminary landscape and geophysical surveys have been undertaken of a possible lead smelting mills site at Oregate Force near Marske
- Assistance to other archaeology groups has included undertaking geophysical surveys of sites at Fair Hill, Alston and Blanchland Abbey for Altogether Archaeology
- Regular monthly information and discussion meetings have continued via zoom and hybrid (where participants have the option of joining online or face to face) formats for SWAAG members and guests
- Talks by SWAAG members covering a wide range of history and archaeology related topics have included :
The Point of Oxan, Orkney by Sheila Ickringil
Out of the Bottle by Keith Thomas
Vikings in Newfoundland by Alan Mills
The Solar Eclipse of 1927 by Les Knight
Marrick Priory by Sandy Carter
Bread Ovens & Campaign Medals by Richard Hunt
Who Lived in East Yorkshire by Ian Earnshaw
- Talks by external professionals, specialists and enthusiasts have included :
Changing Environment & Roman Artefacts by Dr Gillian Taylor of Teesside University
Botanical Remains at Healaugh by Marijke Van Der Veen, Emeritus Professor at Leicester University
Medieval Lindisfarne by Dr David Petts of Durham University
Dr Arthur Raistrick : Polymath by Dr Richard Smith
- Guided walks encompassing areas, sites and features of archaeological interest have been arranged for SWAAG members guests and visitors including :
Maiden Castle & Other Scheduled Monuments, Reeth
A Roman-British Settlement at Applegarth near Richmond
Braithwaite Hall, East Witton & Castle Steads
Addleborough Summit
Keld Wildflowers
Reeth Local History
Rocks, Fossils & an Owl in the Swale Valley near Keld
Scots Dyke near Richmond
- Transcriptions of the Healaugh and Muker Manor Court Books for the period 1686-1786 have continued

The Trustees hold regular board meetings to review financial issues and to discuss activities, policies, progress and other matters

An AGM available to be attended by all SWAAG members either in person or online was held in November 2024

SWAAG publicizes its activities via Facebook and through it's website <https://new-swaag.org>

The website also contains a wide range of archives, databases, newsletters and publications together with other information including the Manor Court Book transcriptions and further details and reports of the talks and walks referred to above

Additional details of objectives and activities (Optional information)

You may choose to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Whilst excavations are supervised by professional archaeologists and training courses are led by specialists, all SWAAG activities are devised, managed, supervised and implemented by SWAAG volunteers

Summary of the main achievements of the charity during the year

See activities listed above

Brief statement of the charity's policy on reserves

Trustees maintain under review the commercial risks to which the charity is exposed (e.g. possible rental of storage space, work required on the website; repairs to and replacement of equipment) as well as those "risks" that arise as a consequence of the research work that SWAAG undertakes from time to time (e.g. requirements for radio carbon dating, environmental sample analyses, finds conservation, archiving) and have reached the view that it would be prudent for SWAAG to strive to retain a level of reserves of some £5000. Cash over and above the reserves may be used to fund research projects. This policy is kept under review and formally reviewed at least annually.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

The accounts for the financial year ending 31st December 2024 have been prepared on a Receipts and Payments basis.

The accounts have been independently examined by Pamela Myers and her report accompanies this report.

A summary of the charity's assets also accompanies this report.

As recommended by the Charity Commission, the accounts have been segregated into Unrestricted and Restricted cash flows. These funds are considered separately below.

Unrestricted Funds

Over the year the charity has generated a net surplus of £232.46 from turnover income of £2,042.22 compared to a net surplus of £448.43 in 2023 from turnover income of £2,120.24.

With regard to income, membership subscriptions produced £1,550 and gift aid of £361.38. In addition we received income from donations, walks, book sales and interest totalling £130.84

Expenditure totalling £1,809.76 was incurred. This included the costs of insurance, bank charges, CBA membership, governance, equipment, talks and website expenses.

There were no Year End Liabilities.

Restricted Funds

There was no restricted funds expenditure in 2024.

Income totalling £25.46 represents interest from a donated fund we hold for the establishment and support of an award for landscape archaeology which now stands at a total of £1,048.26 as at 31 December 2024.

Section F

Other optional information

SWAAG wishes to thank :

- The Yorkshire Dales National Park Authority for it's advice and support
- All of the members and volunteers who generously gave their time and shared their expertise to make SWAAG activities possible
- All of the external speakers who provided us with such a wide range of interesting and informative talks


Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

	
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Full name(s)

Michael Keenan	
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Position (eg Secretary,
Chair, etc)

Treasurer	
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Date

28 March 2025

SWALEDALE & ARKENGARThDALE ARCHAEOLOGY GROUP
ACCOUNTS FOR THE PERIOD 1st JANUARY 2024 TO 31st DECEMBER 2024

	2024 Unrestricted	2024 Restricted	2024 Total	2023	Notes
	£	£	£	£	
Income					
Membership Subscriptions	1,550.00		1,550.00	1,650.00	
Gift Aid	361.38		361.38	361.28	
Donations	65.00		65.00	43.00	
Walks	43.00		43.00	40.00	
Interest	14.44	25.46	39.90	33.31	
Book Sales	8.40		8.40	11.49	
Total Income	2,042.22	25.46	2,067.68	2,139.08	
Expenditure					
Insurance	864.65		864.65	819.88	
Website	524.24		524.24	179.69	
Talks	192.94		192.94	270.51	
Governance	92.94		92.94	90.50	
Equipment	11.99		11.99	85.89	
CBA Membership	63.00		63.00	60.00	
Bank Charges	60.00		60.00	60.00	
Professional Archaeological Support	0.00		0.00	1,728.00	
Project Expenses	0.00		0.00	75.00	
Membership Subscription Refund	0.00		0.00	12.50	
Total Expenditure	1,809.76	0.00	1,809.76	3,381.97	
Excess Of Income Over Expenditure	232.46	25.46	257.92	-1242.89	
1st January 2024 Opening Balance (Bank+Cash)	7,289.92	1,022.80	8,312.72	9,555.61	
31st December 2024 Closing Balance (Bank & Cash)	7522.38	1048.26	8,570.64	8,312.72	
Liabilities at 31st December 2024	0.00	0.00	0.00	0.00	
Debtors at 31st December 2024	0.00	0.00	0.00	0.00	
Signed:					
Michael Keenan, Treasurer					
Date					
Independently Examined By					
Pamela Myers					
Date					
Approved by the Trustees and signed on their behalf					
Alan F. Mills.					
Date					



Section A

Independent Examiner's Report

Report to the trustees/
members of

SWALEDALE AND ARKENGARTHDALE ARCHAEOLOGY GROUP

On accounts for the year
ended

31 December 2024

Charity no
(if any)

1155775

Set out on pages

1 & 2

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2024.

Responsibilities and
basis of report

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent
examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

** Please delete the words in the brackets if they do not apply.*

Signed:

Date:

29.1.2025

Name:

Pamela Jeanne Myers

Relevant professional
qualification(s) or body
(if any):

Address:

53 Pike Purse Lane

Richmond

North Yorkshire DL10 4PS

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.