

# Petty and Ardersier Community Heritage SCIO



## Trustees' Annual Report 1<sup>st</sup> September 2023 – 31<sup>st</sup> August 2024

Archaeology at Petty is 'properly exceptional' 🧑‍🔬



INVERNESS-COURIER.CO.UK

### Historical items dating back 3500 years found at new golf course near Inverness

A range of historical items, including a 3500 year old Bronze Age cremation urn, have been fo...

[View insights](#)

478 post reach >

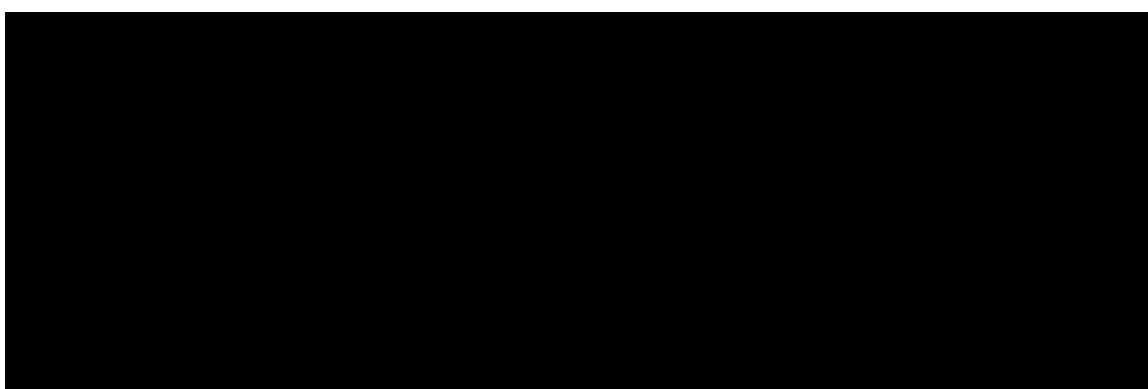
*'New' archaeology described as 'properly exceptional' on our doorstep in Petty parish.*

## Charity contact information



Petty and Ardersier Community Heritage SCIO

Scottish Charity Number: SC046614



Group by Petty & Ardersier Heritage page

### **Petty and Ardersier Community Heritage SCIO Group**

🔒 Private group · 877 members

## Objectives and activities

A local history interest group started meeting informally in 2013, and in 2016 Petty and Ardersier Community Heritage SCIO was set up to constitute the group so that the collection could belong to the group and community, and provision could be made to make it public and keep it safe. Our aims meet the OSCR charitable purposes of the advancement of education, heritage and culture. To meet these purposes, we aim to:

- research, record and promote the preservation of local heritage relating to the Parishes of Petty and Ardersier, Inverness-shire
- create a publicly accessible archive of local heritage information
- facilitate and develop individuals' and community groups' learning, sharing and understanding of the area's heritage.

Our 8th year as a constituted group we had face-to-face meetings again, for a blether, tea and local heritage chat.

Our Facebook group grew and has over 800 followers, and more photos and stories of 'the old days' in Petty and in Ardersier. Thank you to all who contribute and follow the group – you make it happen.

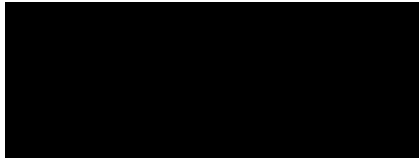
## Outcomes from P+ACH Activities include:

- curating a local Archive
  - a shelf in the local library of heritage information
  - in storage and available by request
  - digital back-up of documents, videos and images
- networking and new contacts with similar interests
  - other local heritage groups
  - other community groups in our area
- raising awareness of local heritage within and out with the community
- being a point of contact for other groups, local historians and people researching their family history
  - via social media and email – responding to requests about heritage, memories and genealogy, and posting about the same

# Structure, governance and management

## Charity Trustees

Our members elect a board of trustees to administer the group and take care of the archive. We currently have three trustees:



## Type of governing document

The Constitution of Petty and Ardersier Community Heritage sets out the purpose and structure of the organisation, membership, and describes how its trustees are elected, how decisions are made, and the administrative duties of trustees and members.

## Trustee recruitment and appointment

The Trustee recruitment process is set out within the Constitution. Every year, at the members' AGM, the serving trustees stand down and the members vote in a board of trustees for the following year. Trustees are recruited from within the membership, and membership is open to all.

This is our 8th annual report, and the same three trustees have stayed in post throughout this time to set up and administer the SCIO. Our current Trustees have interests and experience in genealogy, archaeological studies, and local events of the past.

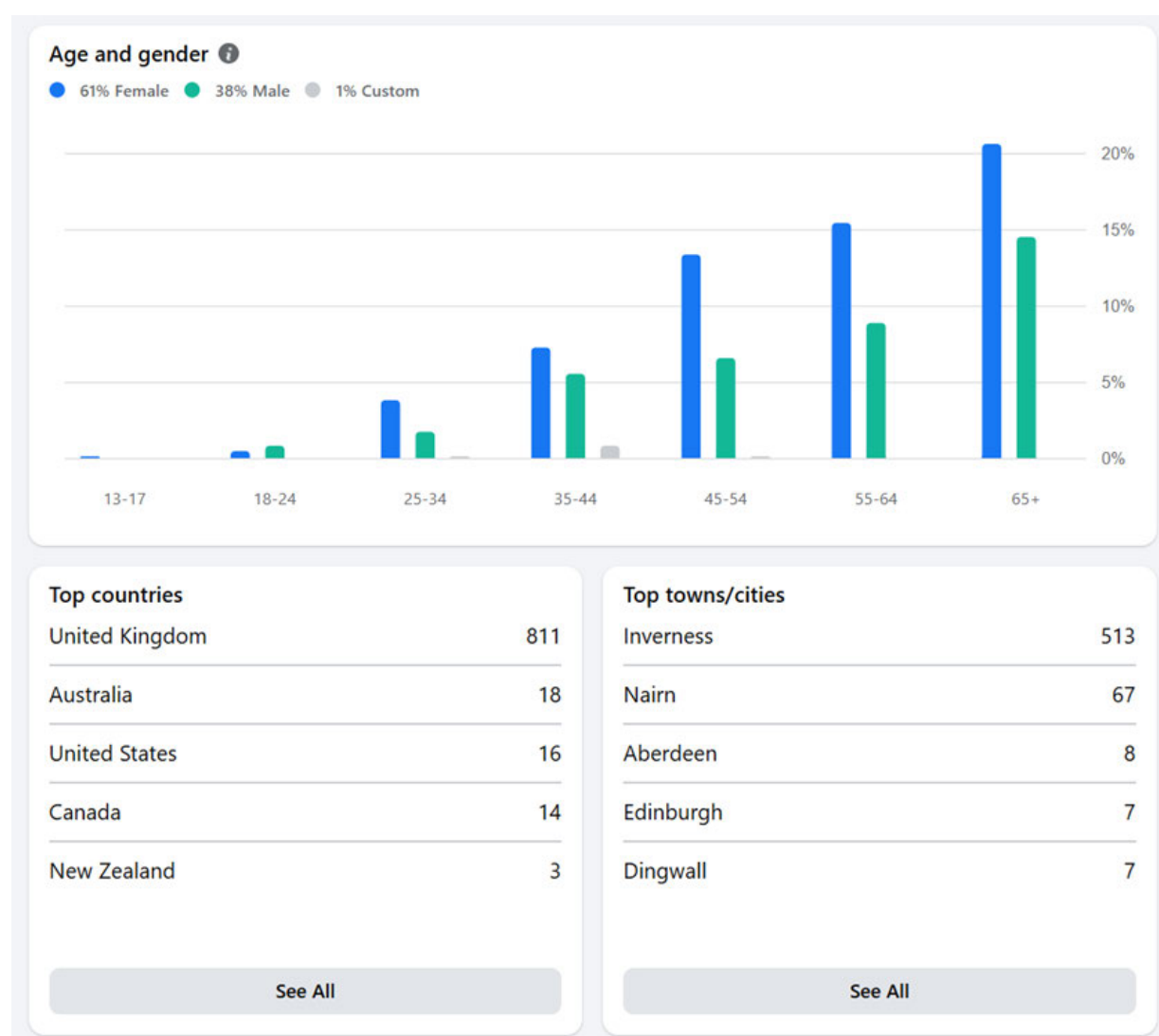
**We would welcome additional trustees,**

having set the size of our Board to between three and eleven Trustees.

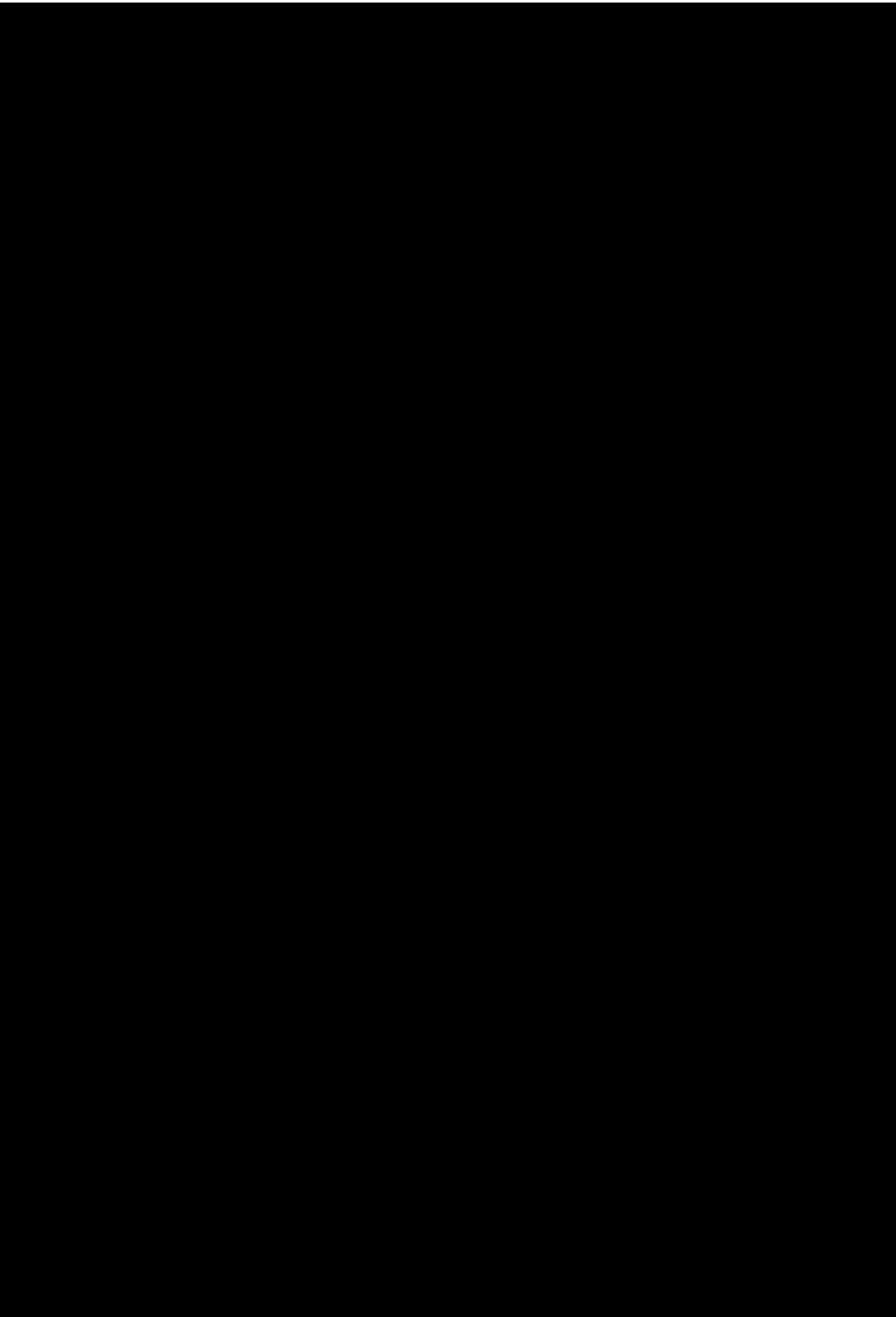
## Achievements and performance

*During 2023-2024, group activities included:*

Printing off some of our digital files and adding them to the local public library collection. Maintaining a small but successful Facebook group – responding to queries, assisting with genealogy enquiries, and sharing information about the area and its heritage. <https://www.facebook.com/oldPettyandArdersier/>



*Age range, and locations of our Facebook group*



*During 2023-2024 we have helped folk in a few different ways:*

- A new shelf of heritage info in the local library – scanning and printing many of our digital files to enable access offline
- Signposting resources such as NLS maps, local photogrammetry
- Discussions on local landmarks
- Lots of old photos and the discussions they generate
- House histories and finding lost placename locations
- Genealogy searching and chat
- Cemetery research and photos
- Sharing local history ads for events
- Highlighting work by local archaeologists and heritage organisations
- Digital scanning of all papers and photos as they are donated or lent to our group, so that we have a digital record, and can display copies with no harm to originals.

## **Financial review**

### **Statement of the charity's policy on reserves**

Use of reserves is solely for the fulfilment of the aims and charitable purposes of Petty and Ardersier Community Heritage. At the end of this financial year, we have funds of £307.53.

**Details of any deficit:** There is no deficit.

## Future plans

For September 2024 – August 2025 we have the following plans:

- Find homes for our collection
- continue our meetings with tea, cake and a blether
- continue building our Archive and making it available
- continue building our relationships with the local organisations and with other local heritage groups
- continue to publicise our aims, encourage participation, and liaise with the community to keep our aims in line with local sentiment

## Declaration

Signed on behalf of the charity trustees:



Designation

TRUSTEE and TREASURER

Date

19 May 2025



# Petty and Ardersier Community Heritage

SC046614

Receipts and payments accounts							
For the period from	Period start date			to	Period end date		
	Day	Month	Year		Day	Month	Year
	1	Sept	2023		31	Aug	2024

## Section A Statement of receipts and payments

	Unrestricted funds	Restricted funds	Expendable endowment funds	Permanent endowment funds	Total funds current period	Total funds last period
	to nearest £	to nearest £	to nearest £	to nearest £	to nearest £	to nearest £
<b>A1 Receipts</b>						
Donations					-	
Legacies					-	
Grants					-	
Receipts from fundraising activities					-	260
Gross trading receipts					-	
Income from investments other than land and buildings					-	
Rents from land & buildings					-	
Gross receipts from other charitable activities					-	
					-	
<b>A1 Sub total</b>	-	-	-	-	-	260
<b>A2 Receipts from asset &amp; investment sales</b>						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
<b>A2 Sub total</b>	-	-	-	-	-	-
<b>Total receipts</b>	-	-	-	-	-	260
<b>A3 Payments</b>						
Expenses for fundraising activities					-	
Gross trading payments					-	
Investment management costs					-	
Payments relating directly to charitable activities	118				118	260
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
Other					-	
					-	
<b>A3 Sub total</b>	118	-	-	-	118	260
<b>A4 Payments relating to asset and investment movements</b>						
Purchases of fixed assets					-	
Purchase of investments					-	
<b>A4 Sub total</b>	-	-	-	-	-	-
<b>Total payments</b>	118	-	-	-	118	260
<b>Net receipts / (payments)</b>	(118)	-	-	-	(118)	-
<b>A5 Transfers to / (from) funds</b>						
					-	
<b>Surplus / (deficit) for year</b>	(118)	-	-	-	(118)	-

## Section B Statement of balances

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
B1 Cash funds	Cash and bank balances at start of year	426					426
	Surplus / (deficit) shown on receipts and payments account	(118)				(118)	
						-	
						-	
	Cash and bank balances at end of year	308	-	-	-	308	426
	(Agree balances with receipts and payments account(s))	-	-	-	-	-	-

Details	Fund to which asset belongs	Market valuation to nearest £	Last year to nearest £
B2 Investments			
	Total	-	-

Details	Fund to which asset belongs	Cost (if available) to nearest £	Current value (if available) to nearest £	Last year to nearest £
B3 Other assets				
	Total	-	-	-

Details	Fund to which liability relates	Amount due to nearest £	Last year to nearest £
B4 Liabilities			
	Total	-	-

Details	Fund to which liability relates	Amount due (estimate) to nearest £	Last year to nearest £
B5 Contingent liabilities			
	Total	-	-

Signed by one or two trustees  
on behalf of all the trustees

Signature\*

Print Name

Date of  
approval

			17 May 2025

## Section C Notes to the Accounts

### C1 Nature and purpose of funds (may be stated on analysis of funds worksheets)

The funds will be used for digitising, storing and exhibiting our growing local heritage collection, to host meetings and activities, and to meet and communicate with other groups with similar interests. Our aims are to:

- Research, record and promote the preservation of local heritage relating to the parishes of Petty and Ardersier, Inverness-shire.
- Create and maintain a publicly accessible resource of local heritage information
- Facilitate learning, sharing and understanding of the area's heritage

### C2 Grants

Type of activity or project supported	Individual / institution	Number of grants made	£
Total			-

### C3a Trustee remuneration

If no remuneration was paid during the period to any charity trustee or person connected to a trustee cross this box (otherwise complete section 3b)	<b>X</b>
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### Authority under which paid

### C3b Trustee remuneration - details

	£

### C4a Trustee expenses

If no expenses were paid to any charity trustee during the period then cross this box (otherwise complete section 4b)	<b>X</b>
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### C4b Trustee expenses - details

	Number of trustees	£

### C5 Transactions with trustees and connected persons

Nature of relationship	Nature of transaction	Transaction amount (£)	Balance outstanding at period end (£)

### C6 Other information

## Petty and Ardersier Community Heritage

SC046614

**Additional analysis (1)**

## Analysis of receipts and payments

## 1 Donations

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
					-	
					-	
					-	
					-	
<b>Total</b>	-	-	-	-	-	-
	-	-	-	-	-	-

## 2 Grants

	Unrestricted funds to nearest £	Restricted funds to nearest £			Total current period to nearest £	Total last period to nearest £
					-	
					-	
					-	
					-	
<b>Total</b>	-	-			-	-
	-	-			-	-

## 3 Gross receipts from other charitable activities

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
					-	
					-	
					-	
					-	
					-	
					-	
<b>Total</b>	-	-	-	-	-	-
	-	-	-	-	-	-

## 4 Payments relating directly to charitable activities

	Unrestricted funds to nearest £	Restricted funds to nearest £	Expendable endowment funds to nearest £	Permanent endowment funds to nearest £	Total current period to nearest £	Total last period to nearest £
Ink	108				108	
Paper	10				10	
Donation towards storage of archive & display boards					-	260
					-	
					-	
					-	
					-	
					-	
					-	
<b>Total</b>	118	-	-	-	118	260
	-	-	-	-	-	-

SC046614

**Additional analysis (2)****5 Breakdown of unrestricted funds**

	Unrestricted fund 1 - enter name of fund below	Unrestricted fund 2 - enter name of fund below	Unrestricted fund 3 - enter name of fund below	Unrestricted fund 4 - enter name of fund below	Total unrestricted funds	Total unrestricted funds last period
<b>Receipts</b>						
Donations					-	
Legacies					-	
Grants					-	
Receipts from fundraising activities					-	260
Gross trading receipts					-	
buildings					-	
Rents from land & buildings					-	
Gross receipts from other charitable activities					-	
<b>Sub total</b>	-	-	-	-	-	260
					-	
<b>Receipts from asset &amp; investment sales</b>						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
<b>Sub total</b>	-	-	-	-	-	-
<b>Total receipts</b>	-	-	-	-	-	260
					-	
<b>Payments</b>						
Expenses for fundraising activities					-	
Gross trading payments					-	
Investment management costs					-	
Payments relating directly to charitable activities					118	260
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
					-	
<b>Sub total</b>	-	-	-	-	118	260
					-	
<b>Payments relating to asset and investment movements</b>						
Purchases of fixed assets					-	
Purchase of investments					-	
<b>Sub total</b>	-	-	-	-	-	-
<b>Total payments</b>	-	-	-	-	118	260
					-	
<b>Net receipts / (payments)</b>	-	-	-	-	(118)	-
					-	
<b>Transfers to / (from) funds</b>					-	
					-	
<b>Surplus / (deficit) for year</b>	-	-	-	-	(118)	-
					-	
<b>Nature and purpose of funds</b>						

## Petty and Ardersier Community Heritage

SC046614

**Additional analysis (3)****6 Breakdown of restricted funds**

	Restricted fund 1 - enter name of fund below	Restricted fund 2 - enter name of fund below	Restricted fund 3 - enter name of fund below	Restricted fund 4 - enter name of fund below	Total restricted funds	Total restricted funds last period
<b>NO RESTRICTED FUNDS HELD</b>						
<b>Receipts</b>						
Donations					-	
Legacies					-	
Grants					-	
Receipts from fundraising activities					-	
Gross trading receipts					-	
Income from investments other than land and buildings					-	
Rents from land & buildings					-	
Gross receipts from other charitable activities					-	
<b>Sub total</b>	-	-	-	-	-	-
<b>Receipts from asset &amp; investment sales</b>						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
<b>Sub total</b>	-	-	-	-	-	-
<b>Total receipts</b>	-	-	-	-	-	-
<b>Payments</b>						
Expenses for fundraising activities					-	
Gross trading payments					-	
Investment management costs					-	
Payments relating directly to charitable activities					-	
Grants and donations					-	
Governance costs:					-	
Audit / independent examination					-	
Preparation of annual accounts					-	
Legal costs					-	
					-	
					-	
<b>Sub total</b>	-	-	-	-	-	-
<b>Payments relating to asset and investment movements</b>						
Purchases of fixed assets					-	
Purchase of investments					-	
<b>Sub total</b>	-	-	-	-	-	-
<b>Total payments</b>	-	-	-	-	-	-
<b>Net receipts / (payments)</b>	-	-	-	-	-	-
<b>Transfers to / (from) funds</b>					-	
<b>Surplus / (deficit) for year</b>	-	-	-	-	-	-

**Nature and purpose of funds**

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# APPENDIX 3



		Independent examiner's report on the accounts <span style="float: right;">v2</span>					
Report to the trustees/members of	Charity name	Petty and Ardersier Community Heritage SCIO					
Registered charity number		SC046614					
On the accounts of the charity for the period	Period start date				Period end date		
	Day	Month	Year		Day	Month	Year
	01	Sept	2023	to	31	Aug	2024
Set out on pages							(remember to include the page numbers of additional sheets)
Respective responsibilities of trustees and examiner	<p>The charity's trustees 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.</p>						
Basis of independent examiner's statement	<p>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.</p>						
Independent examiner's statement	<p>In the course of my examination, no matter has come to my attention [other than that disclosed on the attached page*]</p> <ol style="list-style-type: none"> <li>which gives me reasonable cause to believe that in any material respect the requirements: <ul style="list-style-type: none"> <li>to keep accounting records in accordance with section 44(1) (a) of the 2005 Act and Regulation 4 of the 2006 Accounts Regulations, and</li> <li>to prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 Accounts Regulations</li> </ul> </li> </ol> <p>have not been met, or</p> <ol style="list-style-type: none"> <li>to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.</li> </ol>						
Signed:	[Redacted Signature]				Date:	29.05.2025	
Name:	[Redacted Name]						
Relevant professional qualification(s) or body (if any):	Higher Diploma in Business and Accountancy, Current Finance Director						
Address:	[Redacted Address]						

\*Please delete the words in the brackets if they do not apply. If the words do apply, set out those matters which have come to your attention on the following page.

## APPENDIX 3

### Disclosure section

Only complete if the examiner needs to highlight material problems.

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