

KELSO HERITAGE SOCIETY

**Scottish Charitable Incorporated Organisation
SC047690**

**Trustees Annual Report & Accounts
for the year ended 30th September 2025**



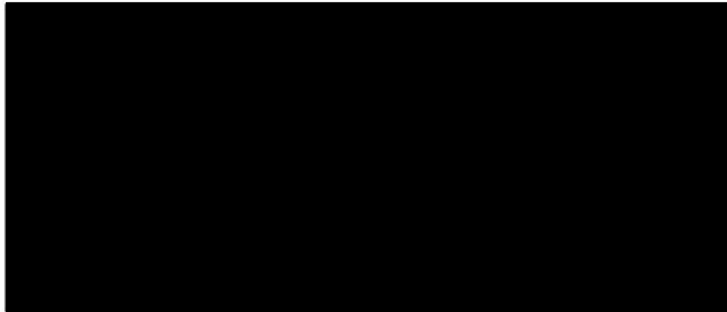
Reference & Administrative Information

Charity Name: Kelso Heritage Society

Scottish Charity No: SC047690

The Charity's Principal Address: 13 Springwood Bank
Kelso
TD5 8BA

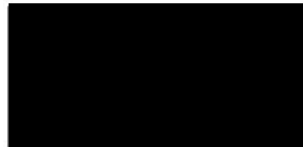
Charity Trustees on date of approval, including office held:



Names of other trustees during the period:



Independent Examiner:



Bankers: Bank of Scotland

Structure, Management & Governance

Kelso Heritage Society is an independent Scottish Charitable Incorporated Organisation that operates under a Constitution. The organisation has a two-tier legal structure and was registered on 31 August 2017. It took on the activities previously run by the Friends of Kelso Museum, an unincorporated association that wound up in favour of the new charity.

Appointment of Trustees

Charity trustees are appointed from the membership at the AGM every year. The maximum number of charity trustees is 12, of whom 10 are elected or appointed; two places are available to co-opt non-members based on their skills and experience. The minimum number of charity trustees is 3.

Objectives & Activities/Charitable Purposes

The organisation's purposes are:

- to promote awareness of local heritage;
- to seek ways to re-establish a museum or heritage facility in Kelso;
- to forge links with the local schools, community groups and youth organisations to promote education of local heritage;
- Liaise and cooperate with local, regional or national agencies to promote local heritage appreciation in Kelso.

Main Activities in Relation to the Charitable Purposes

The main activities include regular talks, walks, and exhibitions and generating literature for publications and leaflets that raise awareness of local history and heritage. We continue developing new projects that enhance Kelso and the District's historical, environmental, and cultural heritage. We have a long-term lease from the Scottish Borders Council on the land that have now restored as Kelso Community Orchard.

Achievements & Performance

Evening Talks and Events Programme September 2024 – April 2025

16 September 2024

██████████ - Scotland's Law Lords v. Northumbrians behaving badly

21 October 2024

████████████████████

18 November 2024 – AGM

██████████ - Kelso High School Archive

20 January 2025

██████████ - Ad Gefrin an Anglo Saxon Royal Township and creating a 21st Century Museum

17 February 2025

██████████ - The Medieval Settlement of Linbrig: The Search for a Lost Chapel

17 March 2025

██████████ - The Life of Lady Grisell Baillie – A 17th and 18th Century Gentlewoman

21 April 2025

██████████ - The History of Shedden Park

Smith Robson Papers

An opportunity arose to bid at auction for a number of papers produced by 19th century Kelso lawyers, Smith and Robson. A crowdfunding account was set up through the Heritage Hub in Hawick but unfortunately the Society was outbid on this occasion. The funds raised have been retained for future historic acquisitions when such opportunities arise.

Bridgend Park

The tree planted by the Duke of Roxburghe in 2023 to commemorate the coronation of King Charles III sustained damage and was replaced during the year by a new Beech tree. The new tree has been planted a few feet away from the original location.

Kelso Abbey Community Orchard

The fruit trees continue to thrive and again produced a crop in August and September 2025, which the community enjoyed.

Kelso Girl Guides have taken on the planting and maintenance of the large planter in the corner of the Orchard. Many thanks to them for improving the look of this area.

Thanks again go to [REDACTED] (G's Garden Services) who has very kindly been cutting the grass and keeping the community space very tidy over the summer. Thanks also to the volunteer who pruned the trees for us.

As in previous years, the remains of the old public footpath that links the Orchard site with Mayfield Riverside Walk (approx. 30m) was kept clear of scrub. This was funded through a small footpath maintenance grant from Kelso Community Council.

During the year a bench commemorating the late Scott Charters was installed in the Orchard. The bench was at the Hirsell Golf Club in Coldstream until the club folded. It has been much appreciated by the public over the summer months.

The Society has received £1,000 from the estate of the [REDACTED] our former secretary. [REDACTED] was the driver behind the creation of the Community Orchard and it is intended to use this money towards its maintenance and development.

Kelso Abbey 900 Anniversary

The Trustees have been participating in public meetings along with Scottish Borders Councillors, the Community Council, Historic Environment Scotland, the University of Edinburgh, other organisations in the town and interested members of the public in exploring how the town should celebrate the 900th Anniversary of Kelso Abbey in 2028.

The Trustees have proposed an academic conference focused on religion and culture at the time of Kelso Abbey's founding and the early centuries thereafter, creation of a 3D virtual tour of the Abbey as it would have looked at its peak, and a renewed campaign to help arrest the decline of the stone structure of the Abbey together with an exhibition of artifacts from the Abbey.

Russell Cawthorn Collection

Support has been given in the development of the Russell Cawthorne Collection of books at Kelso Library. The Collection is being established as a research centre for World War 1.

Enquiries from Members of the Public

A number of enquiries through the website have been answered regarding old businesses and the diaspora of Kelso.

Trustees

All eight trustees were re-elected at the 2024 AGM. [REDACTED] has recently moved out of the area and has resigned as Chair and Trustee. [REDACTED] has replaced [REDACTED] as Chair. All Trustees are thanked for their continued valued service.

Financial Review and Reserves Policy

We made a surplus on our un-restricted funding of £772.24 and a surplus of £1,655.62 on restricted funds. The surplus on the restricted fund was due to a £1,000 legacy left by the [REDACTED] and monies raised to purchase the Smith Robson papers. Total funds held at 30th September 2025, was £10,991.04.

Our Reserves Policy states that: The monies standing to the credit of the Account shall be applied as the Board of Charity Trustees decide in covering our running costs. The Board shall aim to build up a reserve of £5,000 for maintenance of the Heritage Orchard asset.

Nature and Purpose of Funds

All funds raised through membership subscriptions, donations (unless otherwise stated) and book sales are unrestricted and used for the delivery of our charitable activities. Restricted funds may only be used for specific purposes. Restrictions arise when specified by the donor or when funds are raised for specific purposes. During the year, the charity received one restricted grant, a total of £496 for maintenance of the Orchard Path from Scottish Borders Council via Kelso Community Council.

Remuneration to Charity Trustees

No person connected to a Trustee received any remuneration. No charity Trustees received any expenses during the period.

This report was approved by the Trustees on ...17/11/25..... and signed on their behalf by [REDACTED] - Chair

[REDACTED]

Receipts & Payments Accounts for the year ended 30th September 2025

	Notes	Un-Restricted	Restricted	Total 2025	Total 2024
Receipts					
Donations	1	419.80	1,655.62	2,075.42	1,754.20
Grants	2	0.00	496.00	496.00	450.00
Charitable Activities	3	1,879.31	0.00	1,879.31	2,132.95
Total Receipts		2,299.11	2,151.62	4,450.73	4,337.15
Payments					
Relating directly to Charitable Activities	4	1,526.87	496.00	2,022.87	3,743.90
Governance Costs		0.00	0.00	0.00	0.00
Total Payments		1,526.87	496.00	2,022.87	3,743.90
Net Surplus/(Deficit)		772.24	1,655.62	2,427.86	593.25
Statement of Balances as at 30/9/2025					
Cash Funds		Un-Restricted	Restricted	2025	2024
Balance at Start of Financial Year		7,258.04	1,305.14	8,563.18	7,969.93
Surplus/(Deficit)		772.24	1,655.62	2,427.86	593.25
Balance at the Finish of Financial Year		8,030.28	2,960.76	10,991.04	8,563.18
Bank Balance					
Bank of Scotland current account 30/9/2025				10,991.04	
Assets – unrestricted		2025	2025	2025	2024
Kelso Heritage Publications – stock at cost inc donated by KADAS	5	3,818.93	-	3,818.93	4,240.43

These accounts were approved by the trustees on ...29th October 2025 and signed on their behalf by
 [REDACTED] - Treasurer:

[REDACTED]

Notes to the Accounts		2025	2025	2025	2024
		Unrestricted	Restricted	Total	Total
1 Donations					
Donations General		419.80	1,655.62	2,075.42	1,754.20
	Total	419.80	1,655.62	2,075.42	1,754.20
2 Grants					
SBC/Kelso Community Council (Heritage Orchard paths)		0.00	496.00	496.00	450.00
	Total	0.00	496.00	496.00	450.00
3 Receipts from Charitable Activities					
Membership subscriptions		1,170.00	0.00	1,170.00	1,065.00
Heritage Book Sales		421.50	0.00	421.50	507.75
Gift Aid claims		287.81	0.00	287.81	560.20
	Total	1,879.31	0.00	1,879.31	2,132.95
4 Payments for Charitable Activities					
Room hire		516.00	0.00	516.00	404.00
Insurance		358.50	0.00	358.50	348.78
Website/domain name		0.00	0.00	0.00	169.00
Subscriptions		22.00	0.00	22.00	22.00
Post/stationery/administration		63.17	0.00	63.17	59.52
Advertising/printing		547.20	0.00	547.20	741.60
Guest speakers		20.00	0.00	20.00	50.00
Orchard path		0.00	496.00	496.00	554.00
Historic Kelso Book Reprint		0.00	0.00	0.00	1,395.00
	Total	1,526.87	496.00	2,022.87	3,743.90

5 Assets	2025	2025	2024
Kelso Heritage Publications at cost:			
Brought forward:	4,240.43	4,240.43	3,353.18
Historic Kelso Book Reprint	<u>0.00</u>	<u>0.00</u>	<u>1,395.00</u>
	4,240.43	4,240.43	4,748.18
Less stock sold	<u>-421.50</u>	<u>-421.50</u>	<u>-507.75</u>
Total	<u>3,818.93</u>	<u>3,818.93</u>	<u>4,240.43</u>

6 Accounting Notes

Receipts are recognised when receivable, which is when the charity becomes entitled to resource.

Payments are recognised when there is a legal or constructive obligation to make payment. They are classified into the following categories:

- Costs of Generating Funds (Fundraising)
- Charitable Activities (Costs incurred in the delivery of the charities activities and service)
- Governance Costs (Costs associated with the strategic management of the charity)

7 Trustee & Related Parties

No person connected to a trustee received any remuneration. No charity trustees received any expenses during the period. All expenses paid are reimbursements of expenses for the running of the charity.

Independent Examiner's Report on the Accounts of**Kelso Heritage Society
Scottish Charity SC047690****For the Period 1st October 2024 to 30th September 2025****Respective Responsibilities of Trustee & 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) 2005 Act 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 Charities Accounts (Scotland) Regulations 2006. 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 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.

Name of Examiner