

Medieval Bruce Heritage Trust

Scotland · Charity number SC049156

Details

Known as	The Bruce Trust
Status	Active
Legal form	SCIO (Scottish Charitable Incorporated Organisation)
Registered	2019-03-22
Register	View on the OSCR register

Contact

Address 40 George Street
Dumfries
Dumfriesshire
DG1 1EH

Website <https://brucestrust.co.uk/>

Activities

Activities: 'It carries out activities or services itself'

Purposes: 'the advancement of education', 'the advancement of the arts, heritage, culture or science'

What the charity does: See above. we have 6 trustees that help to provide all the activities described above, such as story telling, re-enactments, presentations, guided local tours school visits to inform and educate.

Beneficiaries: 'No specific group, or for the benefit of the community'

Objectives: The Trust's Purposes are to advance education and the arts, heritage, culture and science by promoting an interest in, development and care for the medieval heritage of Dumfries and Galloway with particular reference to the life and achievements of King Robert Bruce.

Geography

- **Main operating location:** Dumfries And Galloway
- **Geographical spread:** Wider, but within one local authority area

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£8,803	£12,413	-	0
2024-03-31	£5,502	£793	-	0
2023-03-31	£991	£546	-	0
2022-03-31	£8	£320	-	0
2021-03-31	£0	£330	-	0
2020-03-31	£1,949	£422	-	0

Medieval Bruce Heritage Trust

Scotland - Charity number SC049156

Accounts

Medieval Bruce Heritage Trust

Accounts : 2024/2025

INCOME

Total

8,803.60

date detail

02/04/2024	membership	1.00
03/04/2024	wagtails wood art	20.00
12/04/2024	Oor Bees stall	20.00
19/04/2024	Ashcroft R H/STU20	20.00
01/05/2024	membership	1.00
15/05/2024	returned cheque	397.60
16/05/2024	Sulwath brewers	20.00
03/06/2024	membership	1.00
05/06/2024	Viking Leathers	20.00
27/06/2024	Historic Scotland	3,000.00
01/07/2024	membership	1.00
18/07/2024	D & G Council	4,000.00
01/08/2024	membership	1.00
02/09/2024	membership	1.00
01/10/2024	membership	1.00
16/10/2024	donations	275.00
17/10/2024	Donation peoples project	200.00
01/11/2024	membership	1.00
02/12/2024	membership	1.00
11/12/2024	Annan History Town	25.00
02/01/2025	Membership	1.00
24/01/2025	Cheque Refunded	500.00
05/02/2025	membership	1.00
27/02/2025	Life Membership (A Thompson)	50.00
03/03/2025	Membership	1.00
11/03/2025	membership L west	12.00
19/03/2025	Donation (Shambelie house)	220.00
21/03/2025	membership (Edith reyntiens)	12.00
		0.00
		0.00
		0.00

Donations	Grants	Booklet sales	Subscriptions	Fundraising	Bruce 750	0	0	0	0
720.00	0.00	0.00	86.00	0.00	7,997.60	0.00	0.00	0.00	0.00

			1.00						
					20.00				
					20.00				
					20.00				
			1.00						
					397.60				
					20.00				
			1.00						
					20.00				
					3,000.00				
			1.00						
					4,000.00				
			1.00						
			1.00						
			1.00						
275.00									
200.00									
			1.00						
			1.00						
25.00									
			1.00						
					500.00				
			1.00						
			50.00						
			1.00						
			12.00						
220.00									
			12.00						

Medieval Bruce Heritage Trust

Accounts : 2024/2025

BANK RECONCILIATION

			Unpresented cheques		
			Amount	Chq no	Payee
Balance of funds as at	1 April		4,567.84		
	Income lodged	8,803.60			
Sub Total			13,371.44		
Less	Expenditure to date	12,413.03			
Total from bank statements at end of latest month			958.41		
	Current account	958.41	0.00	Total	
	Deposit account	31 March 958.41			
Less	Unpresented cheques	0.00			
BALANCE OF FUNDS			958.41		
	Accuracy check		0.00		

Medieval Bruce Heritage Trust

EXPENDITURE

Total
THIS PERIOD
12,413.03

Accounts : 2024/2025

Website	Room hire	vouchers (talks)	Insurance	Sign Post	Auditor	Refunds	Legal	Bank	Bruce 750
300.00	0.00	0.00	72.36	0.00	0.00	0.00	0.00	70.50	11,965.17

date	chq no	payee	
02/04/2024	DD	CSU Web Design	25.00
24/04/2024	DR	Bank Charges	6.20
01/05/2024	DD	CSU Web Design	25.00
08/05/2024	100020	Materials	200.00
08/05/2024	100022	New Web Site first payment (CSU)	375.00
08/05/2024	100021	Alba printers (banners)/displays	700.00
15/05/2024	100019	S Crome (keynote speaker)	397.60
20/05/2024	100023	New Website 2 nd Payment (CSU)	1,155.00
24/05/2024	100024	Alba Printers	240.00
24/05/2024	100025	Alba Printers	76.00
26/05/2024	DR	Bank Charges	5.00
03/06/2024	DD	CSU Web Design	25.00
18/06/2024	100027	Duncarron (shirts)	60.00
21/06/2024	100026	Simon (Acting services)	397.60
25/06/2024	100028	Clarice Milligan (shoes)	45.00
26/06/2024	DR	Bank Charges	7.80
01/07/2024	DD	CSU Web Design	25.00
04/07/2024	100033	Keegan & penny kidd	72.36
04/07/2024	100029	Peoples Project (materials)	149.00
05/07/2024	100031	Sarah Crome (lecture fee)	350.00
08/07/2024	100030	Alba Printers	506.40
24/07/2024	100034	Jordan Kingstree (actor)	100.00
26/07/2024	DR	Bank Charges	7.00
31/07/2024	100042	Nates Forge	300.00
31/07/2024	100032	Vikings (actors)	1,000.00
01/08/2024	100038	Porteous Creative	730.00
01/08/2024	100041	Acting Services	200.00
01/08/2024	DD	CSU Web Design	25.00
01/08/2024	100039	Stomping Ground Creative	1,000.00
02/08/2024	100035	Wild Kat Foraging	250.00
05/08/2024	100037	Costumed Interpretation (actor)	84.00
12/08/2024	100040	Kirsten Miliken (craft workshops)	300.00
13/08/2024	100043	A Thomson (actor)	150.00
19/08/2024	100046	Dr Watson (Speaker)	300.00
21/08/2024	100045	Alba Printers	269.57
26/08/2024	DR	Bank Charges	8.60
27/08/2024	100044	clan Rnballd Trust	500.00
28/08/2024	100055	I McClumpha (tabards)	280.00
02/09/2024	DD	CSU Web Design	25.00
26/09/2024	DR	Bank Charges	7.80
01/10/2024	100047	New web site (CSU)	975.00
01/10/2024	DD	CSU Web Design	25.00
08/10/2024	100048	Photographer Fees	375.00
26/10/2024	DR	Bank Charges	5.40
01/11/2024	DD	CSU Web Design	25.00
26/11/2024	DR	Bank Charges	7.30
02/12/2024	DD	CSU Web Design	25.00
26/12/2024	DR	Bank Charges	5.00
02/01/2025	DD	CSU Web Design	25.00
24/01/2025	100044	Duncarron (shirts)	500.00
26/01/2025	DR	Bank Charges	5.00
03/02/2025	DD	CSU Web Design	25.00
26/02/2025	DR	Bank Charges	5.40
03/03/2025	DD	CSU Web Design	25.00
26/03/2025	DR	Bank Charges	5.00

Website	Room hire	vouchers (talks)	Insurance	Sign Post	Auditor	Refunds	Legal	Bank	Bruce 750
25.00									
								6.20	
25.00									200.00
									375.00
									700.00
									397.60
									1,155.00
									240.00
									76.00
								5.00	
25.00									60.00
									397.60
									45.00
								7.80	
25.00									
			72.36						
									149.00
									350.00
									506.40
									100.00
								7.00	
									300.00
									1,000.00
									730.00
									200.00
25.00									
									1,000.00
									250.00
									84.00
									300.00
									150.00
									300.00
								8.60	
									500.00
									280.00
25.00									
								7.80	
									975.00
25.00									
									375.00
								5.40	
25.00									
								7.30	
25.00									
								5.00	
25.00									
									500.00
								5.00	
25.00									
								5.40	
25.00									
									5

Medieval Bruce Heritage Trust

FINANCIAL REPORT 2024/2025 For the period ended 05/08/2022

INCOME

Donations	720.00
Grants	0.00
Booklet sales	0.00
Subscriptions	86.00
Fundraising	0.00
Bruce 750	7,997.60
0	0.00
0	0.00
0	0.00
0	0.00

EXPENDITURE

Website	300.00
Room hire	0.00
vouchers (talks)	0.00
Insurance	72.36
Sign Post	0.00
Auditor	0.00
Refunds	0.00
Legal	0.00
Bank	70.50
Bruce 750	11,965.17
0	
0	
0	
0	

TOTAL INCOME 8,803.60

TOTAL EXPENDITURE 12,408.03

SURPLUS/DEFICIT
-3,604.43

Independent Examiner's Report to the trustees of Medieval Bruce Heritage Trust

SCO49156

I report on the financial statements of the charity for the year ended 31 March 2025, which are set out on pages 1-3.

Respective responsibilities of Trustee and Examiner

The charity's trustees are responsible for the preparation of the accounts in accordance with the terms of the Charities & Trustees Investment (Scotland) Act 2005 ("the 2005 act") and the Charities Accounts (Scotland) regulations 2006 (as amended) ("the 2006 regulations").

The charity's trustees consider that the audit requirements of Regulation 10(1)(d) of the 2006 Regulations does not apply. It is my responsibility to examine the accounts as required under section (44)(1)(c) of the 2005 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 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 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 of the accounts.

Independent Examiners Statement

In connection with 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) of the 2005 Act and Regulation 4 of the 2006 Regulations and

To prepare accounts which accord with the accounting records and comply with Regulation 9 of the 2006 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:

Signed: 

Date: 27.04.26

Name: CLAIRE UNSWORTH

Address: 48 CAULSTRAN ROAD
DUMFRIES

Medieval Bruce Heritage Trust Annual Report 2024 - 2025.

In February 2025 (financial year 2024-2025) we held our A.G.M showcasing the work of the Bruce 750 event in 2024.

In February 2024, the Trust worked in partnership to secure the support of many partners and funders to launch the event Bruce 750 including local businesses, Dumfries and Galloway Council (Events); Historic Environment Scotland; People's Project Dumfries; and other local charities, with a plan to launch a six month programme of celebration events beginning in February 2024 to July 2024. Many speakers and organisations involved with medieval history were engaged.

The result was a highly successful programme of events across Dumfries and Galloway accumulating in a weekend of celebrations and free activities in Dumfries Town Centre and Castledykes Park in July 2024. A medieval market was also held with a wide range of traders taking part. This programme attracted many visitors to our town and raised awareness of the work of the Trust and the role Dumfries played in the shaping of Scottish history.

The Trust attended many other events including the Guid Nychburriss festival, Japanese Festival, presentations, re-enactments, costumed storytelling and school visits.

After the highly successful Bruce 750 event in 2024, the Trust began seeking a venue for a small visitor centre located in Dumfries with the aim of expanding our work further.

The Trust welcomed a new trustee.

Elizabeth West
Chairperson
Medieval Bruce Heritage Trust

Medieval Bruce Heritage Trust

Scotland - Charity number SC049156

Accounts

Medieval Bruce Heritage Trust Annual Report April 2023 – March 2024

The year from April 2023 to April 2024 saw the Trust stabilise and re-group following the pandemic.

Late in October 2022 we were invited to participate in Medieval Meanderings at Dumfries Museum which was very successful and was attended by members of the public, students from Lancaster University and members of the People's Project Dumfries. We approached the People's Project to ask them to consider some joint partnership working/activities particularly in Castledykes Park, in the future.

In February 2023 we held a Commemoration of the Slaying of the Red Comyn in Greyfriars Church.

In March 2023 we held a pop-up shop in central Dumfries to replenish our funds.

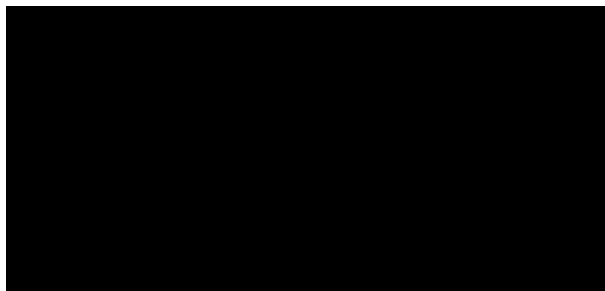
In July 2023 we celebrated the birthday of King Robert the Bruce with a costumed storytelling event in Castledykes Park. This event was very well attended and again members of the People's Project Dumfries, attended.

We then approached the People's Project Dumfries to ask them to consider a partnership to plan for an event in July 2024. The People's Project agreed.

In August 2023 we were invited to participate in a Medieval Day at Sanquhar Museum. We also began discussions with the People's Project Dumfries to form a partnership for an event to celebrate the 750th Anniversary of King Robert the Bruce.

In September 2023 we began the planning of Bruce 750, a two-day event with a medieval market in Dumfries on Saturday 13th July and a costumed storytelling event on Sunday 14th July in Castledykes Park. A full meeting of all interested partners took place in Municipal chamber, Dumfries on 20th September. The event was well attended and all in attendance agreed that such an event would be wonderful for the residents of Dumfries and Galloway and beyond. A Steering Group was formed to take the plan forward. We also planned the updating of our website.

In November 2023 we held our A.G.M. in Cumberland Street Day centre.



Planning continued over the winter and the **Bruce 750 event** was launched on 10th February 2024 at Greyfriars' Church Dumfries

Independent Examiner's Report to the trustees of Medieval Bruce Heritage Trust

SCO49156

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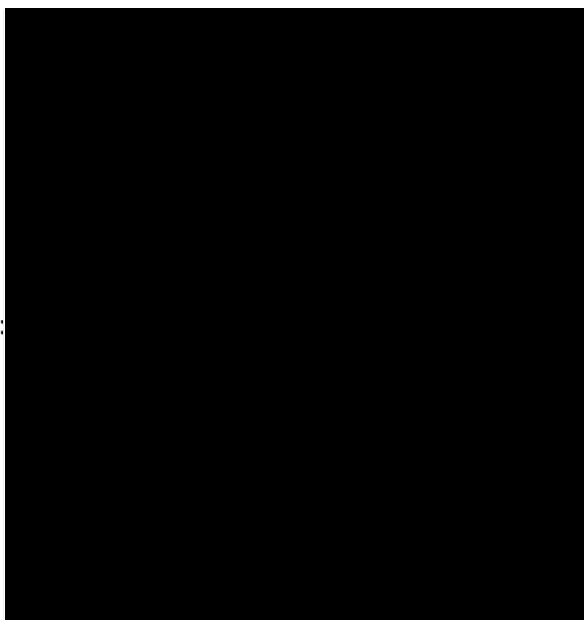
Have not been met, or

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

Signed:

Name:

Address:



Date:

30/01/25

NAME

SETUP SHEET - use this sheet to define the shape and content of your spreadsheet

Name of organisation

Accounts year

INCOME HEADINGS

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

Bank balance at beginning of year

EXPENDITURE HEADINGS

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
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- 10
- 11
- 12
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- 14
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- 20
- 21
- 22
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- 25

Medieval Bruce Heritage Trust

FINANCIAL REPORT

2023/2024

For the period ended

31/03/2024

INCOME

#REF!	#REF!
#REF!	#REF!
#REF!	#REF!
#REF!	#REF!
#REF!	#REF!
#REF!	#REF!
#REF!	#REF!
#REF!	#REF!
#REF!	#REF!
#REF!	#REF!
#REF!	#REF!

EXPENDITURE

Website	300.00
Room hire	267.61
vouchers (talks)	0.00
Insurance	158.43
Sign Post	0.00
Auditor	0.00
Refunds	0.00
Legal	0.00
Bank	66.85
Bruce 750	1,130.40
0	
0	
0	
0	

TOTAL INCOME

#REF!

TOTAL EXPENDITURE

792.89

SURPLUS/DEFICIT

#REF!