APPENDIX 1

OSCR
Scottish Charity Regulator
Office of the Scottish **Charity Regulator**

Trustees' Annual Report for the period							
	Period start date				Period end date		
	Day	Month	Year		Day	Month	Year
From	18	10	24	To	31	03	26

Reference and administration details

Charity name	City of Dunfermline Heritage Group		
Other names charity is known by			
Registered charity number	**SC** 053714		
Charity's principal address	140 Appin Crescent		
	Dunfermline		
	Fife		
		Postcode	KY12 7QS

Names of the charity trustees on date of approval of Trustees' Annual Report

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Andrew Medley	Chairperson		
2	Archie Frail			
3	Robert Swainson			
4	Davy Guild			
5	Ena Cochran			
6	Natalia Lumsden			
7	Val Grant	Treasurer		
8	Paul Sinclair			
9	Morag Ure		04/11/2025	
10	Alistair Craig		04/11/2025	
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Reference and administration details

Names of all other charity trustees during the period, if any, (for example, those who resigned part way through the financial period)

Name	Dates acted if not for whole year
Ronnie Collins	RESIGNED 07/08/2025

Structure, governance and management

Type of governing document	Constitution (Single Tier)
Trustee recruitment and appointment	Interested parties are invited to attend 2/3 meetings to determine whether their interests match the ethos of the group, should they decide they wish to become a member, the Trustees will meet and discuss whether or not the person shares our aspirations and outcomes and vote to accept/dismiss the request.

Objectives and activities

Charitable purposes	a) To promote the care and preservation of Dunfermline's historic built heritage with particular emphasis on Dunfermline's medieval city centre. b) To promote the regeneration of historic buildings and areas of medieval significance: through collaboration with local authorities, property owners, and community groups, we will promote the regeneration of derelict or under-maintained historic buildings, with the goal of returning them to use in a manner that respects their historical significance and benefits the local community. c) To promote the understanding of the development of Dunfermline from medieval times to the present day
Summary of the main activities in relation to these objects	The City of Dunfermline Heritage Group embarked on its journey with initial meetings at the Abbot House Cafe in March 2023. Under the leadership of Sheila Pitcairn, the founding Chairperson, the Group set out to tackle pressing heritage issues in the city. Key concerns included the state of Bruce Street, the accessibility of the path beneath the Palace Wall, and the condition of the Heugh Mills. Engagements with Fife Council officials helped bring attention to the deterioration of historic buildings, although many challenges remain unresolved. Campaigns and Achievements The Group actively sought the restoration of the historic path below the Palace Wall, as well as improved access to the Heugh Mills. While tentative agreements were reached regarding repairs to storm damage, the full reinstatement of the path was ultimately considered too expensive. A significant achievement during this period was the adoption of a new coat of arms for the City, a process led by Sheila Pitcairn. The coat of arms was formally presented in a civic ceremony by Dr Joseph Morrow, Lord Lyon King of Arms, in August 2024. Exploratory Activities and Discoveries Members undertook various exploratory activities, such as traversing the Bridge Street tunnel and investigating the Buffies Brae Bridge. These efforts led to the discovery of mason marks, indicating the reuse of abbey masonry. The Barrel Bridge at Outh was also examined, raising questions about its historical origins. Among other notable finds was an 1855 map in the City Chambers vaults, which related to a significant court case.

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Achievements and performance

Summary of the main achievements of the charity during the financial period	The Group hosted and participated in several heritage events, including the Heritage Trust Network Conference in September 2024. Recognising the need for a more formal structure, the Group registered as a Scottish Charitable Incorporated Organisation (SCIO) in October 2024. The organisation's objectives are centred on the preservation and understanding of Dunfermline's heritage, with the founding Trustees named in its charter. Heritage Projects and Collaborations Efforts to improve public access to St Margaret's Cave resulted in special openings for important events. The Group continues to collaborate with archaeologist Moira Greig on the ongoing Masons' Marks Project. A major mural project, depicting Robert the Bruce and Sir Thomas Randolph, is also in progress, although funding remains a significant challenge. Community Engagement and Ongoing Campaigns During the summer of 2025, the Group organised a highly successful Scavenger Hunt, which engaged many families with local history. Campaigns to address the deterioration of listed properties on Bruce Street are ongoing, supported by local officials and MSP Shirley Anne Somerville. Partnerships and Advocacy Biannual meetings are held with Historic Environment Scotland, and the Group has secured limited funding from Fife Council for meeting space. Additional funds continue to be sought for projects. Plans for the redevelopment of the High Street Gap Site have faced resistance, leading the Group to advocate for greater public consultation and propose naming options for the new square. Future Plans Looking ahead, the Group is preparing for its second year as a SCIO. Upcoming projects include collecting wartime stories for Remembrance Sunday and launching a children's art initiative centred on Dunfermline's history, with an exhibition planned for 2026. Public lectures and talks are scheduled, and development of a dedicated website is underway.

Financial review

Brief statement of the charity's policy on reserves	
Details of any deficit	N/A
Donated facilities and services (if any)	N/A

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Other optional information

Declaration

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

Signed on behalf of the charity's trustees

Signature(s) ***OSCR will accept digital or typed signatures***		
Full name(s)	Val Grant	Andrew Medley
Position (e.g. Chair)	Treasurer	Chairman
Date	31/03/2026	31/03/2026

Enter charity name below

Enter SC No. below

SC

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Receipts and payments accounts

For the period from	Period start date			to	Period end date		
	Day	Month	Year		Day	Month	Year

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 £
A1 Receipts						
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					-	
					-	
A1 Sub total	-	-	-	-	-	-
A2 Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
A2 Sub total	-	-	-	-	-	-
Total receipts	-	-	-	-	-	-
A3 Payments						
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					-	
Other					-	
					-	
A3 Sub total	-	-	-	-	-	-
A4 Payments relating to asset and investment movements						
Purchases of fixed assets					-	
Purchase of investments					-	
A4 Sub total	-	-	-	-	-	-
Total payments	-	-	-	-	-	-
Net receipts / (payments)	-	-	-	-	-	-
A5 Transfers to / (from) funds					-	
Surplus / (deficit) for year	-	-	-	-	-	-

- SC

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					-	
	Surplus / (deficit) shown on receipts and payments account					-	
						-	
						-	
	Cash and bank balances at end of year	-	-	-	-	-	-
	(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**

**** Please note - OSCR will accept digital or typed signatures***

Section C Notes to the Accounts

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

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)	

C3b Trustee remuneration - details

Authority under which paid	£

C4a Trustee expenses

If no expenses were paid to any charity trustee during the period then cross this box (otherwise complete section 4b)	

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

- SC

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 £
					-	
					-	
					-	
					-	
Total	-	-	-	-	-	-
	-	-	-	-	-	-

2 Grants

	Unrestricted funds to nearest £	Restricted funds to nearest £			Total current period to nearest £	Total last period to nearest £
					-	
					-	
					-	
					-	
Total	-	-			-	-
	-	-			-	-

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 £
					-	
					-	
					-	
					-	
					-	
					-	
					-	
					-	
Total	-	-	-	-	-	-
	-	-	-	-	-	-

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 £
					-	
					-	
					-	
					-	
					-	
					-	
					-	
					-	
					-	
					-	
					-	
Total	-	-	-	-	-	-
	-	-	-	-	-	-

SC

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
Receipts						
Donations					-	
Legacies					-	
Grants					-	
Receipts from fundraising activities					-	
Gross trading receipts					-	
buildings					-	
Rents from land & buildings					-	
Gross receipts from other charitable activities					-	
Sub total	-	-	-	-	-	-
Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
Sub total	-	-	-	-	-	-
Total receipts	-	-	-	-	-	-
Payments						
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					-	
					-	
					-	
Sub total	-	-	-	-	-	-
Payments relating to asset and investment movements						
Purchases of fixed assets					-	
Purchase of investments					-	
Sub total	-	-	-	-	-	-
Total payments	-	-	-	-	-	-
Net receipts / (payments)	-	-	-	-	-	-
Transfers to / (from) funds					-	
Surplus / (deficit) for year	-	-	-	-	-	-

Nature and purpose of funds

- SC

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
Receipts						
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					-	
Sub total	-	-	-	-	-	-
					-	
Receipts from asset & investment sales						
Proceeds from sale of fixed assets					-	
Proceeds from sale of investments					-	
Sub total	-	-	-	-	-	-
Total receipts	-	-	-	-	-	-
					-	
Payments						
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					-	
					-	
					-	
Sub total	-	-	-	-	-	-
					-	
Payments relating to asset and investment movements						
Purchases of fixed assets					-	
Purchase of investments					-	
Sub total	-	-	-	-	-	-
					-	
Total payments	-	-	-	-	-	-
					-	
Net receipts / (payments)	-	-	-	-	-	-
Transfers to / (from) funds					-	
Surplus / (deficit) for year	-	-	-	-	-	-
					-	

Nature and purpose of funds

APPENDIX 3

OSCR
Scottish Charity Regulator

	Independent examiner's report on the accounts V2						
Report to the trustees/members of	Charity name						
Registered charity number	**SC**						
On the accounts of the charity for the period	Period start date				Period end date		
	Day	Month	Year		Day	Month	Year
				to			
Set out on pages						(remember to include the page numbers of additional sheets)	

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) 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.
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 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.
Independent examiner's statement	In the course of my examination, no matter has come to my attention [other than that disclosed on the attached page*] 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.
Signed:**	**Date:**
Name:	
Relevant professional qualification(s) or body (if any):	
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.
**OSCR will accept digital or typed signatures.

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	