



2023-24 Annual Report

ABOUT THE TRUST

Perth and Kinross Heritage Trust (PKHT) was established in 1988 with the aim of conserving, enhancing and promoting the archaeological and architectural heritage of Perth and Kinross. Founded by The Gannochy Trust, Perth & Kinross Council, and Perth Civic Trust, PKHT continues to be supported by The Gannochy Trust and Perth & Kinross Council, leveraging additional funding from other sources for specific projects. Since 2012, a core part of our operations is through Historic Environment Scotland's ongoing support of the Perth City Heritage Fund. A Company Limited by Guarantee (Reg. No. 111258) and a Scottish Charity (SC003139), our registered office (as of June 2024): **8 Bridge Lane, Perth, PH1 5JJ**



HISTORIC ENVIRONMENT SCOTLAND | ÀRAINNEACHD EACHDRAIDHEIL ALBA



The Trust achieves its objectives through the delivery of provision of grant aid, projects, consultancy work, and a range of outreach initiatives. This report covers April 2023 to the end of March 2024. For further information, including our Strategic Plan, please visit www.pkht.org.uk

The Board of Trustees:

Ms Maggie Wilkins	<i>Chair</i>
Mr Colin Longhorn	<i>Treasurer</i>
Mr Michael Ballantine	
Cllr Stewart Donaldson	
Mr Neil Grieve	<i>Until Dec. 2023</i>
Mrs Sue Hendry	
Cllr David Illingworth	
Mr Alex Lindsay	
Mr Colin Liddell	
Mr Gary Love	
Ms Sarah Pearce	<i>From Sept. 2023</i>

Trust Staff:

David Strachan	<i>Director</i>
Diane Crighton	<i>Office Manager</i>
Sophie Nicol	<i>Historic Environment Manager</i>
Grace Woolmer-White	<i>Heritage Environment Officer</i>
David Burrows (Until May 2023)	<i>City Mills Development Officer</i>
Vivienne Whyte (From May 2023)	<i>City Heritage Fund/Grants Officer</i>
Lily Mulvey (Until July 2023)	<i>Outreach and Promotion Officer</i>
Ciaran Quigley (Until August 2023)	<i>Skills Training and Outreach Officer</i>
Rory Bryce (From October 2023)	<i>Outreach Officer</i>
Jenny Campbell (From October 2023)	<i>Perth City Heritage Fund Assistant</i>

The auditors for the year were Morris & Young, Perth.

CHAIRPERSON'S REPORT



Over what has proved a challenging year, the Trust successfully continued to deliver the Perth City Heritage Fund, supporting the regeneration of Perth with Historic Environment Scotland funding. Having applied for a new tranche of funding for 2023-26 we were delighted to receive confirmation of HES's continued support at the end of March 2023. We appointed Vivienne Whyte as City Heritage Fund/Grants Officer in May 2023, and Jenny Campbell as Perth City Heritage Fund Assistant in October 2023. We welcome them both and look forward to bringing improvements in the delivery of the scheme over the next three years.

Grace Woolmer-White has successfully managed the planning archaeology service to Perth & Kinross Council to cover Sophie Nicol's maternity leave, upskilling the organisation through her personal professional development. In addition, the Trust delivered Doors Open Days 2023 and has further developed our Community Heritage Grant scheme.

Both Lily Mulvey and Ciaran Quigley moved on during the year, and we must thank them for all they contributed in the short time they were with us, and we welcome Rory Bryce who replaced Lily as Outreach Officer in October 2023.

Over the year, Development Officer David Burrows progressed our proposals for the Lower City Mills however in September 2023 the National Lottery Heritage Fund deferred our application until March 2024. Partly in response to this, and on considering other tactical and strategic risks to the project and the organisation, the Trust regrettably made the difficult decision not to progress with the project later that month. Project development had begun in 2019, and amongst other factors, the uncertain financial environment that has evolved post-Covid compromised our business plan for a sustainable end use.

The Trust remains committed to promoting the value of Lower City Mills as a nationally important heritage asset and an important opportunity to enhance the cultural offer of the city. However the significant overheads of the un-refurbished Lower City Mills has meant the Trust will have to relocate its base elsewhere, while the Trust reviews its operations and returns to the core business activities that it has successfully delivered over the last 30 years. To that end we published our revised Strategic Plan 2024-26 in December 2023.

Finally, we were pleased to celebrate the launch of the '*Three Forts On The Tay*' publication in January 2024, the result of three years of community archaeology undertaken over 2014-17 as part of the Tay Landscape Partnership scheme. It is a good omen of things to come as we have reintroduced community archaeology into our future planning.

Maggie Wilkins
Chairperson
May 2024

PERTH CITY HERITAGE FUND

Supported by Historic Environment Scotland on behalf of the Scottish Government, our City Heritage Fund continues to regenerate Perth through the conservation of key historic buildings within its Conservation Areas. Grant aid brings high quality repairs that create safe and energy efficient workplaces and comfortable homes. A new three-year tranche of funding began in April 2023, securing total funding of £750,000 over 2023-26, consisting of £248,159 unrestricted revenue and £501,841 restricted capital grant. Projects completed or ongoing over the year include: The Y Centre (St Andrew's Church), Atholl Street; 31B, 39-43 High St; McIntyres Corner, Bridgend; 1 Kings Place; 80-82 Dundee Road and 59-65 George Street.



1 King's Place - full comprehensive building repair including re-slating and re-pointing

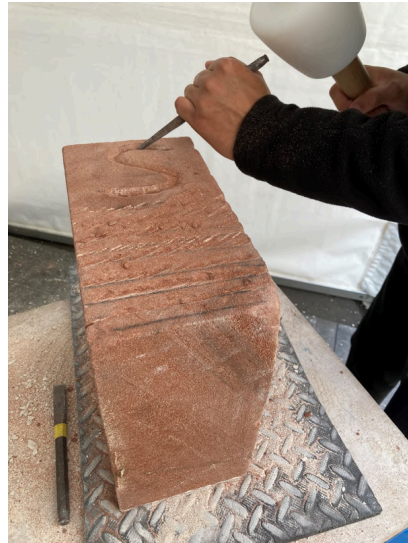


80-82 Dundee Road Window Repairs

The Y-Centre full comprehensive building, now complete

PERTH CITY HERITAGE FUND

The fund also provides educational and training activities including a series of online CPD lectures and an 'in-person' practical CPD masterclass on timber preservation, as well as the 2-day Traditional Building Skills Roadshow. This was held at St John's RC Academy and was attended by 90 pupils from both Perth Grammar School and St John's RC Academy, who learned stone carving, joinery repairs, roof slating and drystone dyking.



Traditional Building Skills Roadshow



In-person practical CPD masterclass in traditional window repairs

PERTH LOWER CITY MILLS

Over 2023, Perth & Kinross Council (PKC) highlighted uncertainty regarding available funding for the Planning Archaeology Service provided by the Trust to PKC planning officers and in February 2024 confirmed significantly reduced funding from April 2025. This uncertainty was a significant contributing factor in the Trust's difficult decision not to take forward the Lower City Mills project after four years of development.

Additionally, the Round 2 application, submitted in May 2023 to the National Lottery Heritage Fund for £1.4m, was deferred in September 2023, in part due to the lack of flowing water at the mill to turn machinery as part of the visitor offer, and due to the uncertainty around future core income that compromised the sustainability of our business plan.

As a result, the Trust decided to relocate its operational base to another central Perth premises, and by December 2023 produced a revised Strategic Plan covering 2024-2026. The plan has three objectives: to develop a new community archaeology project; relocate our operational base; and to raise the profile of the trust. However the Trust has remained committed to finding a viable future for Lower City Mills, sharing research and documentation with PKC, who at the time of writing have indicated they will take forward a project using UK Levelling Up funding.



The 19th century mill machinery at Lower City Mills, a rare survivor in an urban setting (photo: Tom Ryan).

PROTECTING AND RECORDING ARCHAEOLOGY

The Trust continues to play a key role in the preservation of archaeology in the area through the planning archaeology service provided to Perth & Kinross Council planners. Screening of planning applications results in recommendations for planning conditions to mitigate impacts, and trust staff then engage with developers and contractors to ensure appropriate work is completed. This can range from survey and monitoring to full-scale excavation, post-excavation analysis and publication, ensuring archaeological sites and historic buildings are preserved, either in situ or by record, before destruction or major change.

Over the year, significant projects have included Iron Age settlements at the James Hutton Institute, Invergowrie, and at Forfar Road, Meigle where an impressive souterrain was discovered. In addition to archaeological evaluations and watching briefs, several standing building surveys were completed, including at various steadings complexes; Kinloch and Ardler Churches; Craigdallie Cottage; Glenlyon House; and Logiealmond Hunting Lodge. Several walkover surveys were also undertaken as a result of the increasing number of peatland restoration schemes; discoveries include a previously unrecorded shielings on the Lick Estate, and a Neolithic arrowhead found during a breeding birds survey on the Urlar Estate, now successfully registered with Treasure Trove.



Part of the large Souterrain and its paved floor from the Forfar Road, Meigle Excavations.



Excavation of one of the large stone structures at the James Hutton Institute, Invergowrie, for which reporting has now been undertaken.

PROTECTING AND RECORDING ARCHAEOLOGY



*Neolithic Arrowhead from Urlar Estate
(© P. Cosgrove).*



*Samian Ware Sherd Found at Forfar Road, Meigle
(© AOC Archaeology Group).*

HISTORIC ENVIRONMENT RECORD

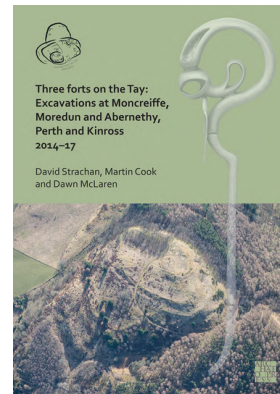
Our Historic Environment Record (HER) continues to underpin much of our work from development management to community projects and public enquiries. This database of all known archaeological sites, historic buildings, events and interventions, and relevant literature, is linked to a GIS map system so that data can be viewed and interrogated visually.

Work over the year has focused predominantly on essential HER maintenance work and record entry, and provision of HER data extract requests from professionals and the public. This has been due to the HER Officer also delivering the Planning Archaeology Service on behalf of the HER Manager, who has been on maternity leave.

THREE FORTS ON THE TAY BOOK LAUNCH

In January 2024, we launched our latest major publication, *Three Forts on the Tay*, at AK Bell Library, Perth, and celebrated the monumental endeavours of the 376 volunteers who helped us to excavate the sites through the Tay Landscape Partnership Scheme.

This citizen science project has made a significant contribution to establishing Tayside as a well-studied area for the site type both within Scotland, and further afield. The project excavated three hilltop forts on the Tay estuary to explore both their enclosing works and internal buildings, and uncovered an impressive assemblage of small finds. At the book launch, volunteers and archaeologists joined the authors, who gave presentations on the project, followed by a keynote endorsement of the publication by Prof. Ian Ralston, Emeritus Abercromby Professor of Archaeology, University of Edinburgh.



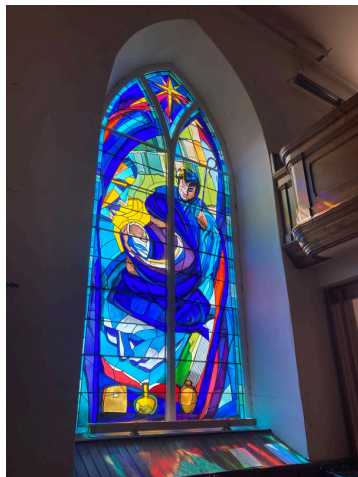
The Three Forts On The Tay publication with authors David Strachan, Martin Cook and Dawn McLaren, and replica finds at the book-launch.

COMMUNITY HERITAGE GRANTS

Launched in May 2021 and developed from a pilot scheme in 2020, our Community Heritage Grants Scheme has committed over £70,000 towards local heritage initiatives with a further £70,000 available in the fund.

Over the course of the year, five projects were awarded grant funding; stained glass window repairs at Longforgan Parish Church; a QR code interpretation trail at Dunkeld awarded to Dunkeld Community Archive; restoration and regilding of the weathercock at St John's Kirk of Perth; clock repairs at Alyth Parish Church; and Rob Roy Way interpretation for Pitlochry Partnership.

Longforgan Parish Church and St John's Kirk successfully completed their projects, with photos of the successful repairs included below. An additional three projects are partially complete and have received interim payments. These comprise the memorial stone at Abernethy, stained glass window repair at Meikleour Village Hall, and building repairs at Moncrieffe Pavilion.

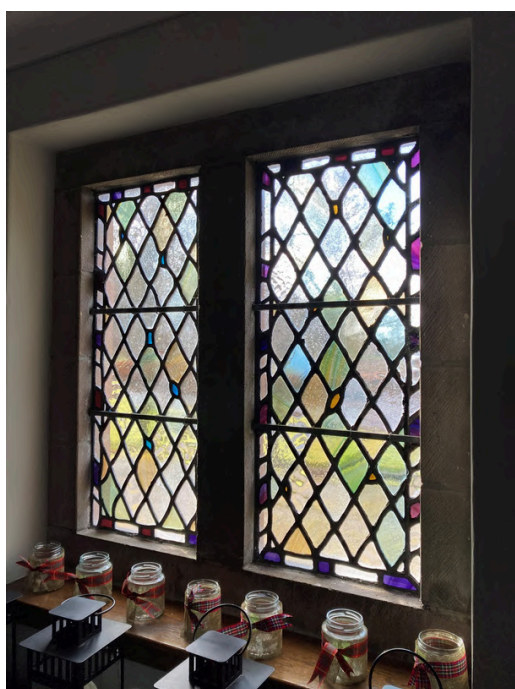


Repairs completed to Longforgan Parish Church stained-glass windows, and repair and regilding of the weathercock at St John's Kirk, Perth.

COMMUNITY HERITAGE GRANTS



Memorial stone, Abernethy - carving now complete. Awaiting planning decision on location.



Meikleour Village Hall – stained glass windows, repairs partially complete

DOORS OPEN DAYS

Doors Open Days is the annual celebration of the built environment co-ordinated nationally by The Scottish Civic Trust (SCT) as part of European Heritage Days. Delivered in Perth and Kinross over the weekend of 16-17 September it included 34 venues on the theme of 'Living Heritage', celebrating beliefs, events, and skills we inherit from past generations. The theme was explored at many venues and included the woodworking courses at Inverquiech; the excellent hub of traditional skills at Little Bellyclone Farm; and the Quarto Press, which highlights a novel and unique way of printing.

Exciting new venues included Pitlochry Festival Theatre, with behind-the-scenes tours, and Crieff and Strathearn Museum who welcomed 150 visitors. Other highlights included Cultybraggan Camp, the Lower City Mills, and Perth Cathedral, the latter of who welcomed 170 visitors from 7 difference countries, including one couple who had cycled from Suffolk on a tour of all 50 Episcopal and Anglican Cathedrals in Scotland and England.



Doors Open Day 2023 programme (left), Traditional Skills Training at Bellyclone (Top Right), Auchterarder Picturehouse (Middle Right), and Perth Academy (Bottom Right)

TAY LANDSCAPE PARTNERSHIP MONITORING

The Trust is responsible for the monitoring and maintenance of products from the Tay Landscape Partnership Scheme and retains restricted funds for this purpose. Monitoring of sites, ranging from hillforts to clay buildings was carried out over the year and plans made for repairs in 2024/5.

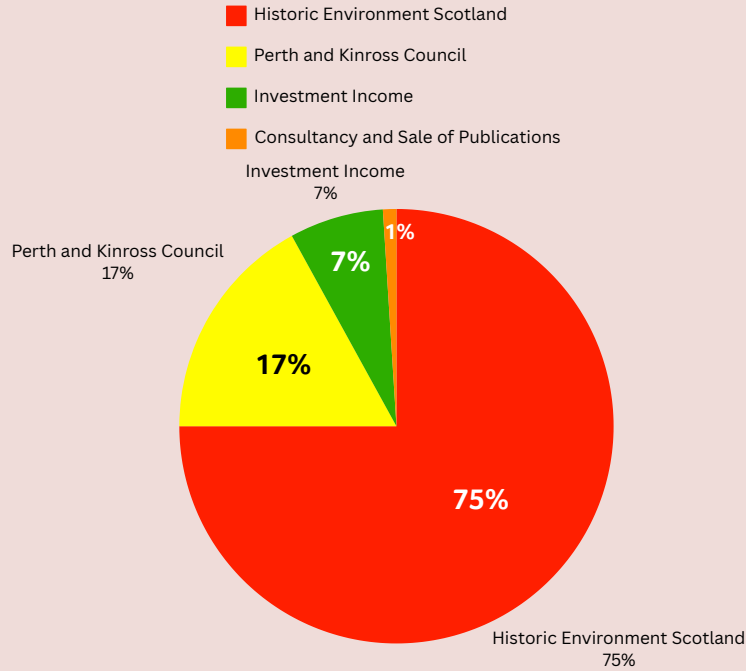
LOOKING AHEAD

By far the biggest short-term challenge to the Trust is the significant reduction in core funding, as of April 2025, agreed by Perth & Kinross Council (PKC) with respect to the Planning Archaeology Service provided by the Trust through a Service Level Agreement. The Trust will negotiate revised terms with PKC in the hope that a mutually agreeable solution can be found that will not threaten the quality of service the Trust has provided to PKC over the last 24 years. More positively we have secured confirmation of a further three-year tranche of support by Historic Environment Scotland for the City Heritage Fund, and we look forward to progress being led by Vivienne Whyte, who comes to the Trust with a wealth of relevant historic building experience, having previously held the role of Conservation Officer with Perth & Kinross Council.

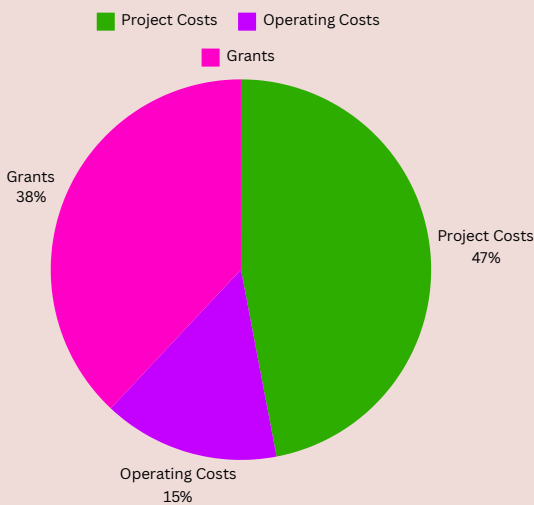
However, the most significant event over the next year will be the relocation of our office out of Lower City Mills to 8 Bridge Lane, opposite Perth Concert Hall. This city centre location will provide a much-raised profile for the Trust and a strong base from which to promote our work across the area. Given these changes, we are currently working to revised Strategic Plan 2024-26, published in December 2023.

FINANCIAL REPORT

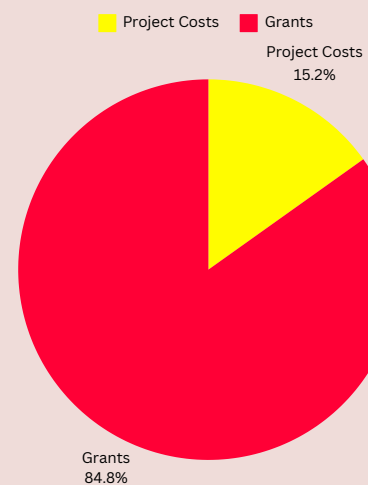
Perth and Kinross Heritage Trust Analysis of Income 2023/24



Analysis of Total Expenditure 2023/2024



Analysis of Restricted Expenditure 2023/2024



	2022/23	2021/22	2020/21	2019/20	2018/19
Operating Costs	12%	13%	19%	22%	12%
Project Costs (including salaries)	55%	44%	43%	44%	47%
Grants	32%	43%	38%	33%	42%

FINANCIAL REPORT

The income and expenditure of the Trust is analysed in the above charts.

The Trust's total income for the financial year 2023/2024 amounted to £587,868 (2023 - £193,836). The largest contributors during the year have been Historic Environment Scotland and Perth and Kinross Council. The Trust appreciates the continued support of its funding partners, The Gannochy Trust and Perth & Kinross Council, and appreciates funding from all other sources. Due to charity accounting regulations requiring certain grant income to be recognised in full in the accounting period that the grant offer is received, £248,160 of core funding from the Historic Environment Scotland for the period April 2023 to March 2026 was recognised in the accounts for the year ended 31 March 2023.

The Trust's expenditure in 2022/2023 totalled £552,999 (2023 - £821,908), which resulted in a net operating surplus of £34,869 for the year (2023 - net deficit of £628,071).

The net assets of the Trust amounted to £869,900 (2023 - £835,031) as at 31st March 2024.

Income & Expenditure Account Year ended 31st March 2024

	Unrestricted Funds £	Designated Funds £	Restricted Funds £	Total Funds 2024 £	Total Funds 2023 £
Total Income	386,135	6,750	194,983	587,868	193,836
Total Expenditure	(288,621)	(33,294)	(231,085)	(553,000)	(821,908)
Net Income /(expenditure) for the year	(97,515)	(26,544)	(36,102)	34,869	(628,072)

Unrestricted funds are available for use at the discretion of the Trustees in furtherance of the general objectives of the charity.

Restricted funds are subject to restrictions on their expenditure imposed by the donor or through the terms of an appeal. In respect of the Trust this relates to the Tay Landscape Partnership Maintenance Fund and Building Preservation Fund.

FINANCIAL REPORT

Balance Sheet

As at 31st March 2024

	2024 £	2023 £
Fixed Assets		
Tangible Assets	-	-
Investment Properties	85,000	85,000
	<u>85,000</u>	<u>85,000</u>
Current Assets		
Debtors	335,963	314,678
Cash at Bank and In Hand	878,539	1,015,796
	<u>1,214,502</u>	<u>1,330,474</u>
Creditors: Amounts falling due within one year	<u>(429,602)</u>	<u>(580,443)</u>
Net Current Assets	<u>784,900</u>	<u>750,031</u>
Total assets less current liabilities	<u>869,900</u>	<u>835,031</u>
Deferred Income	-	-
Net Assets	<u>869,900</u>	<u>835,031</u>
The funds of the charity		
Restricted funds	119,741	146,315
Unrestricted funds:		
Designated funds	489,795	544,279
General unrestricted funds	225,049	109,122
Revaluation reserve	35,315	35,315

Note: Full accounts are available on Companies House website (<https://www.gov.uk/government/organisations/companies-house>).

Perth and Kinross Heritage Trust

8 Bridge Lane

Perth

PH5 JJ

www.pkht.org.uk