



SCOTTISH  
ORNITHOLOGISTS'  
CLUB



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**ANNUAL REPORT AND ACCOUNTS FOR  
THE YEAR ENDED 31 MARCH 2021**

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## A WELCOME FROM THE PRESIDENT

**A very warm welcome to the 2020-2021 Annual Report and Accounts of the Scottish Ornithologists' Club. This report aims to provide you with detailed information on the activities of the Club during the reporting year in the context of the five charitable aims set for the SOC. Again, we have placed more emphasis on the challenges and achievements of the year, and less on the mechanics of the running of the Club, as we think this is more relevant to you, the members. In a brief introduction, it is impossible to run through all the activities undertaken in the year, so more detail is provided in the sections that follow.**

As reported last year, March 2020 brought the biggest unexpected upheaval for decades, with the outbreak of the coronavirus pandemic. This meant that the story of 2020-2021 revolves around the Club navigating its way through the various COVID-19 restrictions in a way that minimised damage to the future of the Club, staff and membership. Staff did a fantastic job, acting swiftly to make the transition to working from home in a way that caused the minimum of disruption to day-to-day operations and enabled us to re-open Waterston House when it was safe and practicable to do so. The team was supported by a temporary executive group formed to help with the immediate urgent and necessary decisions in the early days of the pandemic.

SOC Council and the various committees continued to meet as required via video conference and we made an early correct decision to cancel an in-person annual conference in favour of an online AGM event. In collaboration with BTO Scotland, the same cautious approach was adopted for the March 2021 Scottish Birdwatchers' Conference, but we hope very much to return to normal in 2022. Branches also made the switch from in-person to online meetings, which allowed a full and varied programme of winter talks to commence from September, as usual. This was only possible thanks to the commitment and perseverance of the small working group of Council, staff and branch committee members to come up with a workable plan. It was noticeable that members from the remoter parts of Scotland and beyond were participants in many of the talks and I suspect we will continue to run hybrid programmes for some time to come as a means of reaching members in far-flung places. We also established an online art gallery to continue to promote the work of our many artist friends whose help and co-operation was very welcome indeed. We also appreciated the business support grants provided by East Lothian Council during the lockdowns.

At the outset of the pandemic, we decided to make the March 2020 issue of *Scottish Birds* available freely online, as a gesture to the wider birding community in lockdown, unable to get out in the field. The gesture was extremely well received and we continue to work on an online option for *Scottish Birds* for the future.

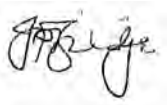
The SOC's *Where to Watch Birds in Scotland* mobile app continued to be well used, with perhaps the switch to 'staycations' increasing the value of the resource. We were absolutely delighted to receive the BTO's prestigious Marsh Award for Local Ornithology in October in recognition of the app and its contribution to promoting an interest in Scotland's birdlife.



## A WELCOME FROM THE PRESIDENT (CONT)

I do want to record our sadness at the passing in September of Frank Hamilton, an Honorary president of the SOC, one of Scotland's ornithological greats. He will be missed.

Finally, I want to offer grateful thanks to all those who have helped the Club during the year: the office bearers, Council, committee members, volunteers, staff, partner organisations and donors. Special thanks are due to Andy Thorpe, who stepped down at the end of the year after doing a sterling job as SOC Treasurer for many years. The *Scottish Birds* team also experienced major changes with the sad passing of long-standing articles editor, Jimmy Maxwell, in August, and Ian Andrews stepping down from his role as Coordinating Editor in January; a huge thanks to Ian for all he has done for the journal. Stuart Rivers left his post as Birding Officer in October – many thanks for all your work, Stuart – and Council made the decision in March to pursue a full-time replacement in 2021-22. Shenaz Khimji was recruited as front-of-house weekend staff and many of you will now have met her at Waterston House. Without the support and commitment of these and the many other SOC members who are too many to mention here, the Club would not have continued to thrive in the most disruptive of years, nor be what it is today. My heartfelt thanks to you all, and I know we will continue to meet the challenges as we get through these strange times.



**Ian Bainbridge**





# OBJECTIVES & ACTIVITIES

The Scottish Ornithologists' Club (SOC) promotes the study, enjoyment and conservation of wild birds and their habitats across Scotland.

To this end, the Club operates 15 local branches across the country and has a growing membership in the region of 3,500. It brings together like-minded people with a passion for birds, nature and conservation, through a programme of talks, outings, conferences and publications.

We also support a network of volunteers across Scotland, gathering vital information about Scotland's birdlife. The health of birds reflects the health of the wider environment. By recording which species we've seen, when and where and how many we saw, scientists can better understand the effects of pollution, habitat loss, climate change and modern farming on our wild birds.

This data is one of the first points of reference in informed conservation planning, and we work with other organisations to promote the practice of keeping bird records and submitting them for scientific research.

We offer grants for ornithological field work and publications, develop and support young birdwatchers, maintain Scotland's largest ornithology library and host regular art exhibitions at our Waterston House headquarters in East Lothian.

## OUR AIMS

**The purpose of the SOC is to advance the study and appreciation of birds in Scotland and to do so by:**



**PROMOTING**  
the study and documentation  
of Scotland's birdlife



**PROMOTING**  
interest in wild birds



**PROMOTING**  
the conservation of birds and  
their habitats in Scotland



**PROVIDING**  
a focus for information relating to the  
study of birds in Scotland



**ENCOURAGING**  
the appreciation of the creative  
arts relating to natural history



## ACHIEVEMENTS & PERFORMANCES

### PROMOTING THE STUDY AND DOCUMENTATION OF SCOTLAND'S BIRDLIFE

*Constantly gathering information about birds is key to conservation in a time when many species' numbers are declining. Every day, our volunteers all over the country endeavour to record vital information about Scotland's birds to help protect them, provide a picture of wider environmental change, and build up ornithological history.*

### TURNING BIRDING INTO VALUABLE DATA

The SOC is the umbrella organisation for bird recording in Scotland, managing much of the network of local bird recorders (LBRs) who volunteer their time to undertake the crucial work of collating information about birds in their area. The vast archive of data and reports generated by LBRs is an invaluable conservation tool, made available to birders, conservationists, planners and developers through the local bird reports (see below), the Online Scottish Bird Report, BirdTrack, and the National Biodiversity Network Gateway. Under the guidance of the Birding and Science Committee, work has begun on updating guidelines for LBRs, and bringing the Scottish LBR community together at a workshop to improve the way the SOC can work with this hugely important volunteer community.

*Little did I know that when I took over as SOC Highland Recorder in January 2020, my first year in the "job" would probably be one of the most unusual years for birding and record gathering ever experienced. Naturally, I expected that with travel restrictions, lockdowns and very few visiting birders to the region compared to normal, records would be rather limited. Indeed, looking at Birdtrack data, sites visited in the region for the year were down by over 1000. So I was rather surprised to see records submitted to Birdtrack actually increase by almost 29,000 to 179,150 for the 12 months to December compared to 150,463 the previous year!*

*I presume the negative impacts had been offset by local birders having more time on their hands to watch gardens and local patches. It was particularly interesting to note a rise in breeding records of Long-eared Owl, very under-recorded in Highland. These seemed to often come from people, "non-birders" included, discovering calling young when out on walks locally, possibly in areas they didn't visit that often under normal circumstances. Although we may not have been able to visit so many places, local birding activity certainly showed no downturn during these trying times and even produced some unexpected results.*

John Poyner. Highland Recorder, August 2021

## ACHIEVEMENTS & PERFORMANCES (CONT)



One function carried out by this community is the production of **local bird reports**. These keenly anticipated publications annually summarise the status of birds within a given recording area, using data supplied by the local birding community (as an example, the 2020 North-East Scotland annual report is based on a dataset of 113,633 individual records). They usually consist of accounts for each species occurring in the area, describing numbers, distribution, and phenology among other things, as well as articles relevant to the local birding community. Examples of species accounts for each region can be found via the [Online Scottish Bird Report](#). In total, five local bird reports were published by the SOC in the year to March 2021: Borders 2019, Caithness 2019 (digital format only), Highland 2018 & 2019 (print and digital format), Lothian 2018. A further nine reports were produced by regional bird Clubs or dedicated bird report groups. A full list of the reports available can be found on the SOC website.



## ACHIEVEMENTS & PERFORMANCES (CONT)

### BIRDTRACK – COLLATING DATA FOR CONSERVATION

SOC continues to be an active member of the [BirdTrack](#) partnership, attending two annual steering group meetings alongside the BTO, RSPB, BirdWatch Ireland and Welsh Ornithological Society. BirdTrack is an online tool that birdwatchers can use to store their sightings, keep up to date with what others are seeing, analyse trends, and contribute to a national database to support species conservation. A key area for development has been the facilitation of the use of 'big data' in local bird reports. During the year, the BirdTrack team worked on a suite of tools that will allow bird report compilers to produce a variety of maps and graphs for species occurring in their recording area. This will make meaningful reporting on a greater number of species much easier at a local level.

### ENCOURAGING RESPONSIBLE BIRDING DURING A PANDEMIC

During normal times, the focus of responsible birding is to encourage observance of the [Birdwatchers' Code](#), with the focus on avoiding disturbing birds, particularly during the breeding season. In 2020/21, the message to birders everywhere was to help prevent the spread of coronavirus.

Throughout the height of the pandemic, we kept the SOC website updated with the latest Scottish Government advice and urged the general birdwatching community to restrict their informal bird monitoring to observations made locally during their permitted exercise hour – an appeal echoed by SOC President in an email circulated to members in April and in his Foreword in the summer issue of *Scottish Birds*. There was some provision in the regulations for organised survey work to continue during the various lockdowns and we referenced the BTO Scotland website for more specific guidance for fieldworkers.

### SOC BIRDING AND SCIENCE COMMITTEE – SPEARHEADING OUR WORK

The Birding and Science Committee was formed in 2019 to develop the Club's role in promoting birds, birdwatching and conservation activities in Scotland. It is chaired by Professor Jeremy Wilson (SOC Vice-President *Birding and Science*), and made up of members of several conservation organisations and SOC committees. The Committee met in September via video conference. A key discussion item was how to make a digital version of the Club's journal *Scottish Birds* available to members. A paper was produced by Committee member, Mark Wilkinson, and presented at the November Council meeting, where it was approved for staff to take forward, with a view to having an online *Scottish Birds* available by June 2021.

Another major development led by the Committee was the proposal to appoint a full-time SOC Birding and Science Officer, to help the Club achieve its wide-ranging objectives in this area. The vacancy went live just before the end of the reporting year, with interviews arranged for May and the successful candidate took up post in mid-June 2021.





## ACHIEVEMENTS & PERFORMANCES (CONT)

### SUPPORTING RESEARCH AND SURVEYS THROUGH THE SOC ENDOWMENT FUND

Each year since 1966, the SOC's Endowment Fund has supported amateur field work studies that further our knowledge about Scotland's birds, and contribute to their conservation. Donations and gifts in Wills from our supporters fund these important grants.

Applications for the grants are administered by the Research and Surveys Committee. For the year under review, a total of £1,586 was committed to supporting the following projects:

- Tern tracking, Tiree, Hayley Douglas (£100)
- Honey-buzzard survey, Central Scotland Honey-buzzard Group (£800)
- Rousay Skuas, Helen & David Aiton (£250)
- Colour Ringing Kittiwakes, Lothian Ringing Group/Forth Seabird Group (£436)

With the arrival of COVID-19, most of the 2020 award recipients were forced to postpone their fieldwork until the following year. One exception was the Central Scotland Honey-buzzard Group. The group comprising a team of experienced raptor surveyors managed to pick up the project from June, only slightly later than hoped, and the work undertaken over the summer proved a great success. Breeding was successful at one site in Central Scotland, with two young reared. Remarkably, one of the young was photographed on the Isle of Bute, just six days after being last seen at the breeding site, having commenced its migration in a south westerly direction. A detailed account of the progress made in 2020 was published in *Scottish Birds* Vol 41 (1) pp10-12.

Meanwhile, in Orkney, Helen and David Aiton (assisted by their Pointer, Mia) were able to monitor chick survival but not eggs in nests during the summer due to the timing of COVID-19 restrictions on internal ferry travel. While this resulted in incomplete data, there were encouraging signs for the Arctic Skua, with 13 chicks having fledged and plenty of adults on territory. It was mixed fortunes for the Bonxies and poor for the gulls. The couple were looking forward to a more satisfying field season in 2021, to include egg monitoring.



David and Mia with Arctic Skua chick, Rousay, July 2020 © Helen Aiton

## ACHIEVEMENTS &amp; PERFORMANCES (CONT)

Hayley Douglas' field season on Tiree was disrupted not by the pandemic but by the tern nests being washed out by heavy storms. A change in ownership of Inchkeith in the Forth Estuary and other local political issues curtailed plans to ring Kittiwake on the island and this funding application has been withdrawn.

A combination of the devastating fire in the Tay reedbeds in April and lockdown restrictions meant that Derek Robertson, who had received a grant the previous year for his Water Rail studies, was unable to recover any geolocators deployed during his 2019 field season.

With the country still firmly in lockdown in January, uncertainty continued into the 2021 field season. Perhaps as a result, only three applications were received by the 31 January deadline for the 2021/22 awards. Of those applications, one was withdrawn as a private donor had come forward to cover the costs, and another was rejected on the basis of it replicating previous studies. This left just one application for a grant of £600 towards the study of late spring sea ducks in the Moray Firth. As knowledge of this species group is limited, the Committee was unanimous in its support for the project, which was undertaken in late spring 2021 by David Patterson, Carl Mitchell and Dave Tanner.

### COORDINATING SURVEYS THROUGH LOCAL DISCUSSION GROUPS

Lothian Discussion Group would normally meet at Waterston House on the first Wednesday of each month between September and April. Owing to COVID-19 restrictions, the group made use of Zoom to conduct their meetings virtually. Key agenda items were the Rocky Shore Count (31 January) and the planned East Lothian Winter Atlas, an ambitious one-season avifauna aimed at covering all 212 tetrads in the county.

By the end of 2020, prospects for the atlas were looking very good, with virtually all tetrads allocated with the help of an interactive online map. In the event, some volunteers living outside East Lothian were unable to get to their allocated sites due to travel restrictions and a few of the group were able to cover those sites. By the turn of the year, however, with the early survey season over, other gaps came to light and with continuing restrictions, not everyone could do what they had hoped to do.

The Group also coordinated SOC Lothian members' participation in the [national Icelandic Goose Census](#) (ICG). The October event, focusing on Pink-footed Geese, was one of three IGC dates organised by the WWT during the year. In Lothian, 23 volunteers covered approximately 40 sites (including several per BTO WeBS), with additional casual observations from a further five sites. The final tally for the October count alone was almost 23,000 geese, with just over three-quarters of those at Aberlady.



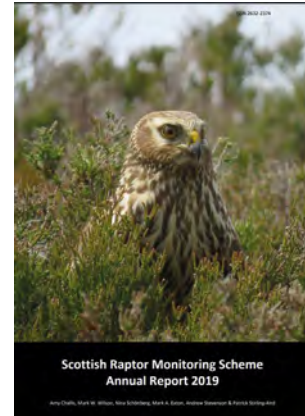
In North-East Scotland, local observers were encouraged to submit all records of a particular species over the year. The 2020 species was Mistle Thrush, with the spotlight on Collared Dove in 2021. Other local monitoring activities in the North East during the year included a survey repeating 1989's efforts to count birds on lowland mosses, which was run in conjunction with RSPB.

## ACHIEVEMENTS & PERFORMANCES (CONT)

### SUPPORTING PUBLICATIONS THROUGH THE BIRDS OF SCOTLAND FUND

**Over £10k invested in new ornithological publications this year**

This year, the Birds of Scotland (BS3) Fund committee approved applications for financial support to publish two new publications, due to be published in the latter part of 2021, in addition to the second instalment of a three-year pledge to support the publication of the [Scottish Raptor Monitoring Scheme \(SRMS\) annual report](#). The SOC is one of nine organisations that makes up the Scheme, which collates, curates and reports raptor monitoring data from across Scotland and makes the information available for a wide range of conservation purposes.



The total amount committed to publications in 2020/21 was £10,866, split as follows:

- Scottish Raptor Monitoring Scheme annual report, SRMS (£1,750)
- North Sea Bird Club 40 Year Anniversary Report (£5,116)
- A Monograph of the Purple Sandpiper, Ron Summers (£4,000)

Towards the end of the reporting year, an application was received from Martin Cook for assistance with the publication of an update of his book, *The Birds of Moray and Nairn*. The application was given the 'amber' light (Stage 1 approval) in February.

A link to the full list of publications supported by the Fund since 2008 can be found on the [BS3 Fund page](#) of the SOC website.

### KNOWLEDGE TRANSFER – BIRD ID SKILLS

The first opportunity we had to resume our programme of guided walks was in early autumn, as Scotland looked forward to the planned move into Phase 4 of the Scottish Government's route map out of lockdown. A total of six walks were organised for September by course leader Scott Paterson at sites in East Lothian and Loch Leven and all were fully booked, reflecting the continued popularity of these courses and, in particular, Scott's accessible, friendly, expert tuition. However, a rise in infections in some areas of the country prompted a Scottish Government announcement in the second week of September limiting numbers able to meet outdoors, which meant only one of the walks went ahead, with the rest cancelled.

As it was clear from early in the new year that lockdown was going to continue for some time and we would not be able to run our bird ID courses in the field, we used email to furnish our 500-strong mailing list of beginners and improvers with seasonal bird ID hints and tips and useful resources to support their solo birdwatching until we were able to gather again. This led on to the idea of a private SOC Birdwatching for Beginners Facebook group, which was launched just after the end of the reporting period, in early April 2021. The aim was to provide a platform for group members to post their bird ID and behaviour

## ACHIEVEMENTS & PERFORMANCES (CONT)

queries and have these answered by a small team of experts in the form of knowledgeable birders from within the Club.

### TRAINING YOUNG PEOPLE TO RECORD BIRDS

Since 2014, the SOC and the Isle of May Bird Observatory have collaborated to offer a Young Birders' Training Course (YBTC), giving six birdwatchers aged between 16 and 25 years a unique opportunity to spend a week on the Isle of May learning essential bird survey skills and techniques. With the Club's Development Officer on maternity leave from November 2019, course organisers viewed 2020 as a welcome opportunity to pause the course for a year and carry out a review of the structure and procedures, to ensure that the initiative continues to meet its core objectives going forward. Unfortunately, the coronavirus outbreak diverted resources away from the planned review, which was carried over to 2021. This delay, coupled with prevailing uncertainty in the first part of 2021 regarding the continued effect of the virus, resulted in a decision being made to postpone resuming the YBTC until summer 2022.

The first review meeting took place via Zoom in January and identified the need for greater acknowledgement of the on-island contribution from NatureScot and CEH. Course organisers also hope to build on the legacy of the course by involving previous participants in teaching future successful applicants.

### SCOTTISH BIRD CAMP

Keen to expand and build upon the Club's suite of educational initiatives for young birdwatchers and buoyed by the ongoing success and response to the Young Birders' Training Course, the Club joined forces with BTO Scotland to devise and develop the first Scottish Bird Camp. This exciting development was made a reality, in principal, by funding support kindly secured from Cameron Bespolka Trust and *British Birds* Charitable Trust.

Due to take place over the weekend of 12-14 June 2020, the Camp was to seek to provide a wonderful and unique opportunity for young people (aged 10-16 years) to develop their natural history skills, to be inspired by amazing experiences and to meet like-minded others. A bustling programme of events was lined up to showcase the very best of East Lothian's birdlife and wild places, including a seabird boat trip, a bird ringing demonstration, bird walks and an opportunity to learn about nest finding, all due to be delivered under the guidance of experienced and enthusiastic trainers.

Sadly, the course had to be postponed due to the coronavirus pandemic but we are delighted to be once again planning to run the activity in May/June 2022.

### SOC YOUTH CONNECT

The Club's fledgling Facebook Group, SOC Youth Connect, did not have much of an opportunity to spread its wings during the reporting year owing to the pandemic, and only recorded one official (virtual) meeting. The Zoom-hosted social session took place on the afternoon of Saturday 24th January, providing a welcome opportunity to see faces old and new, and discuss lockdown experiences, as well as reaffirm the commitment to reigniting group activity once COVID-19 regulations allowed.





## ACHIEVEMENTS & PERFORMANCES (CONT)



Lauren Evans, birding around Edinburgh

*I spent lockdown in North Bristol with my mum and younger brother. Although returning home from University in Edinburgh was initially a bit of a shock, we quickly developed into a routine of daily walks. We were very fortunate with the amount of greenspace available to us locally; I would never have guessed back in March 2020, before the pandemic really tightened its grip, that we would end up walking over 40 laps of the local woods in just a few months!*

*Bristol didn't quite match up to the wildlife hotspot I was used to visiting throughout my time at University and I thought I would miss the ability to travel to my favourite wild places. However, I quickly found myself noticing and enjoying the diverse birdlife on my patch more than ever before. This ranged from the excitement of watching Peregrine Falcons and Kestrels glide over the Avon Gorge to the simple pleasure of seeing a Mallard raise her chicks on the river Trym. I discovered nesting House Martins at the train station and happened upon a bird feeder in Ashton Court Estate, frequented by Great Tit and even a Nuthatch!*

*I understand that for many people during lockdown, wandering around a woodland looking for birds everyday was simply not an option. The pandemic helped me to truly appreciate how lucky I was to be surrounded by accessible greenspace and how beneficial nature can be during these troubling times.*

Lauren Evans, SOC Youth Connect

Details of the ways in which the Club supports the next generation of ornithologists can be found on the [Young Birders page](#) of the SOC website.



## PROMOTING INTEREST IN WILD BIRDS

*Getting people to take an interest in and care about wild birds is important if we want to protect them. We do this in many different ways.*

### AWARD-WINNING BIRDING APP

The Club was honoured to receive the prestigious Marsh Award for Local Ornithology from the BTO for our innovative Where to Watch Birds in Scotland mobile app.

The Award for Local Ornithology is given to a bird club or group that publishes a book, completes a study or conducts any other exceptional activity in the preceding calendar year that advances knowledge about birds. The app breaks totally new ground in countryside access for both new and experienced bird watchers, or anyone interested in wildlife. It also encourages users to record their observations to assist citizen science and is free to download and use.



*The existence of this wonderful resource is the result of many hundreds of hours of work from birders across Scotland. A great example of what is possible when people work together for the common good.*

Ben Darvill, Development and Engagement Manager, BTO Scotland

*We have been bowled over by the way the app has been received and have heard of people buying their first smartphones just so they could use it! Winning the Marsh Award is a real honour and we hope it encourages more people to enjoy the Scottish countryside and to help record our special wildlife.*

Prof Jeremy Wilson, SOC Vice-President Birding and Science, October 2020

## PROMOTING INTEREST IN BIRDS (CONT)

The app was launched in April 2019 and has since been downloaded almost 14,000 times and had over 675,000 views; SOC membership is around 3,400 so the app is clearly reaching a wide audience! Most users (about 90%) are in Britain but in any particular month there are users in about 90 countries around the world. Interestingly, at the height of the first COVID-19 lockdown, in the summer months, there was a marked increase in site views (Fig 1), presumably because people were looking at places to see birds within their local area whilst travel was restricted.

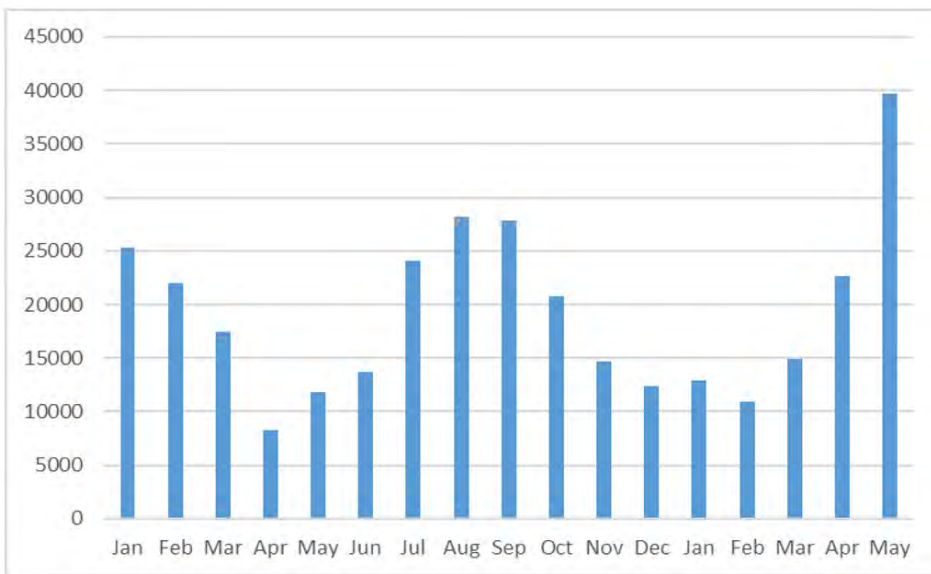


Fig 1: Number of SOC app site accounts viewed per month (Jan 2020-May 2021)

## REACHING OUT VIA DIGITAL PLATFORMS

With Waterston House closed from 24 March in line with the Scottish Government's lockdown at the outset of the COVID-19 pandemic, staff made a speedy transition to homeworking. Weekly team meetings took place via video conference each Monday morning allowing staff to maintain vital face-to-face contact as well as plan the online communications for the week ahead, with the focus firmly on how to continue engaging with our members and the wider birdwatching community in the absence of being able to welcome visitors to Waterston House or being able to run face-to-face conferences and branch activities around the country.



Hats off to HQ staff and volunteers! Zoom screengrab, February 2021

As well as launching an Online Art Shop on the SOC website to go some way to bridging the gap formed by not being able to host exhibitions in the gallery at Waterston House (see p27-28), we took to all of our digital channels to deliver a mix of timely, engaging and educational content.

PROMOTING INTEREST IN BIRDS (CONT)



When COVID-19 regulations allowed a skeleton staff to return to work from the office, we took the opportunity to include regular social media features on Waterston House itself. This enabled members and others who normally visit the centre in person to continue to enjoy the experience albeit virtually. For more distant members, it was an opportunity to get different views of the building, meet the volunteers behind the scenes, and to see our gardens change over the months.

The focus on growing our presence on social media has enabled us to promote surveys and campaigns to a broader audience than just our membership. Retweeting and quoting posts of affiliated organisations has increased coverage overall of items related to promoting interest in Scotland's birdlife. Running with themes from the topics of campaigns or calendar celebrations allowed us to bring a level of consistency to our postings and tweets each week.

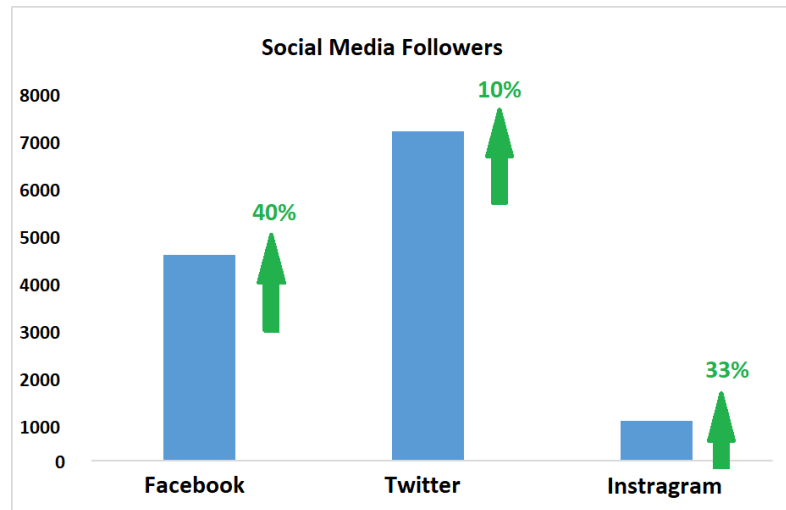


Fig 2: Increase in the Club's social media following in 2020/21 compared to the previous year

With lockdown meaning the closure of the George Waterston Library, staff member, Rosie Filipiak, delivered a weekly 'Librarian's Choice' slot on our Twitter and Facebook pages. This began the first week of April with *Cuckoo: Cheating by Nature* by Nick Davies, and proved very popular, with the *AA Book of Birds* being the SOC's top tweet in July and generating a considerable number of engagements and replies. This platform has also provided the Library with another way to promote its extensive collection.

**Tweet activity** ×

**The SOC** @ScottishBirding  
SOC Librarian's Lockdown Choice #17  
AA Book of British Birds  
This comprehensive book was much more than just a species guide. It covered identifying birds by jizz, had sections covering their biology, and each species is beautifully illustrated in a naturalistic stance.  
pic.twitter.com/vaPxe6rRudn

Impressions	38,740
Total engagements	2,507
Media engagements	1,338
Detail expands	747
Likes	253
Profile clicks	83
Replies	49
Retweets	23
Link clicks	14

Librarian's Choice, July 2020 – top Tweet



## PROMOTING INTEREST IN BIRDS (CONT)

### SOC BLOG

Launched in June 2020, the [SOC Blog](#) helped us increase our lockdown content and broaden the scope of our digital communications. With the capacity to include more text and images, we were able to share interesting bird stories sourced from SOC staff and Club members around the country. With a new blog published monthly on the SOC website, topics ranged from 'Locked down in Milngavie' – a member's wildlife adventures during the height of the COVID-19 restrictions – to 'From the Uplands to the Coast' – a staff member's reflection on 'new' birdwatching after moving house.

### SPRING MIGRANTS TABLE

In the stillness of the second lockdown, signs that spring 2021 was on its way were more obvious than ever. As Whooper Swan, Redwing, Fieldfare and our other winter visitors began to make their way to their northerly breeding grounds, and the sounds of geese in the air was fading, our countryside was becoming alive with bird song and birders everywhere looked forward to the return of our spring and summer migrant birds from Africa and Southern Europe.

The [Spring Migrants Table](#) is a long-running resource available exclusively on the SOC website and provided by BirdLine Scotland that keeps track of the very latest migrant birds reported. After a break in spring 2020, owing to the pandemic, the service resumed in early March 2021, with the first Willow Warbler and White Wagtail arrivals and sightings of Sand Martin and Chiffchaff getting the show on the road. In addition to the table on the website, a free email alert service was launched, offering the choice of table updates only or a popular enhanced version, which included helpful migrant bird ID hints and tips. By the end of the March, there were over 500 birders signed up to receive the alerts.

### BRANCH NEWSLETTERS

Newsletters produced by branches have been an important component to keep members engaged at a local level during the year notwithstanding the lack of indoor and outdoor meetings.

With physical meetings cancelled, Stewartry branch, whose small size means the members all know each other well, took advantage of its regular newsletter to include news on members' comings and goings alongside the usual bird and branch news – not strictly falling into any of the SOC's aims but appreciated nevertheless by recipients in a period of comparative isolation.

A development in Clyde branch communications was the launch of @Clydebirding on Twitter. Run by members of the local branch, the account is a regularly updated resource providing the latest bird news for the area.



## PROMOTING INTEREST IN BIRDS (CONT)

### VIRTUAL TALKS PROGRAMME

Throughout Scotland, branches adapted to the pandemic by switching from indoor meetings to a series of online talks, some pairing up with other branches, and all ably supported by SOC HQ. Although the social aspect of in-person meetings was lost, there were some positives to this switch as many local groups reported a larger audience for their online talks, as a result of these live broadcasts being available to those usually unable to make the indoor meetings, and also to anyone from around the world!

This was not the only switch to digital – some branches took this opportunity to investigate producing an electronic version of the local bird report as a complement to the printed copy as well as a step towards a greener product, a reduction in printing costs and an opportunity for the good work of the branch to spread even further through the local community and wider birding community.

### OUTINGS PROGRAMME

Unfortunately, all scheduled branch outings had to be cancelled during the first COVID-19 lockdown and as uncertainty surrounding the direction of the virus continued as we looked towards the autumn, most branches preferred to stick with online engagement only.

The few branches that decided to go ahead with some field trips chose locations that allowed for adherence to Scottish Government guidelines in place at the time, such as sites with no hides or paths that allowed social distancing to be maintained and car parking facilities that meant no car sharing was necessary. A dedicated working group of SOC Management Committee produced a detailed Duty of Care document, which was made available to outings organisers along with any specific COVID-19 guidance.

Following a relaxation in the rules on meeting others outdoors, six members (the maximum number permitted under Government regulations at the time) of Central Scotland branch enjoyed a successful and safe trip to North Ronaldsay in late August/early September.



Baird's Sandpiper © George Gay

*The branch excursion to North Ron proved very successful with lots of walking, camping, cycling and variable weather. Although there weren't large numbers of migrants, several rarities were found including Fea's Petrel, Baird's Sandpiper, Eastern Subalpine Warbler, Barred Warbler and Common Rosefinch. There was also a good passage of seabirds, especially Sooty Shearwaters, while small numbers of Brent Geese and Curlew Sandpipers, and large numbers of Ringed Plovers, Golden Plovers and Sanderlings, were seen.*

Rick Goater, Chair, Central Scotland branch

## PROMOTING INTEREST IN BIRDS (CONT)



Central Scotland branch trip, North Ronaldsay, August 2020 © Jeff Banks

### ALTERNATIVE BIRD RACES

In the spirit of lockdown, several branches held *alternative* bird races during early 2021. Instead of driving round the countryside in a car, species had to be spotted on participants' local walks or in their gardens, and sightings were submitted to the branch secretary to collate. Caithness led the initiative, holding its race in January, with North-East Scotland, Fife and Tayside following suit in February.



*I am excited to announce that we collectively recorded **110 species** across Caithness over the weekend (16-17 January), which is an amazing achievement for our alternative bird race given that we were so restricted in our movements! Well done everyone, and thank you for all your efforts, especially given the weather.*

Nina O'Hanlon, Secretary, Caithness branch

North-East Scotland's race saw a total of 93 species recorded, including locally scarce species such as Great White Egret and Iceland Gull. Unfortunately, the pandemic meant that the branch's planned programme of innovative 'Aberdeen Birding Calendar' training events had to be postponed.

## PROMOTING INTEREST IN BIRDS (CONT)

### SUPPORT FROM MEMBERS DURING DIFFICULT TIMES

Growing our membership base is crucial to safeguarding the future of the Club, not only in terms of subscription fees helping to finance our ornithological work but, importantly, providing us with a community of bird experts to draw on to help deliver our charitable aims and a captive audience for us to inspire and equip with knowledge and skills that will ultimately benefit Scotland's birds.

As the pandemic started to unfold, there were some concerns about how SOC membership numbers would fare. However, we are delighted to say that these fears proved unfounded. Whilst there was an initial rise in cancelled or lapsed memberships, it also became apparent that people were discovering the joys of birdwatching to help them through difficult times. Over the course of the financial year, 232 new members joined the Club, remarkably similar to the same period in 2019-2020 and representing an increase on 2018-2019 (Fig 4). In fact, in February and March 2021, there was a flurry of new members (31 and 39 respectively), almost double that of the same months in previous years.

Members are asked upon joining about where they heard about us. Online searches and word of mouth were among the top answers, and we welcomed back quite a few previous members. Our engagement of the public via social media also proved successful in spreading the word about the Club. By the end of the 2020-21 financial year, our total membership was 3,414 – a small but encouraging increase on the previous year (Fig 3).

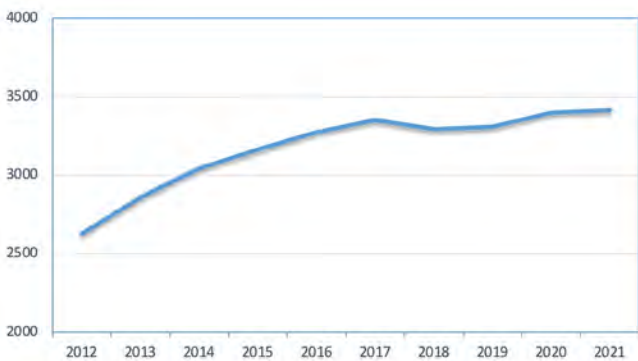


Fig 3: Total number of members (where joint and family subscriptions are counted as two members) in 12 months to March.

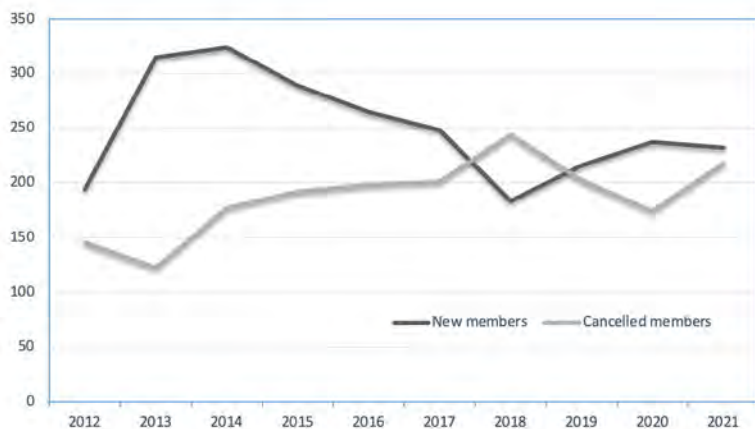


Fig 4: Number of new and cancelled/lapsed memberships in the 12 months to March.







# PROMOTING THE CONSERVATION OF BIRDS AND THEIR HABITATS IN SCOTLAND

In 2020, the coronavirus pandemic highlighted just how central nature is to our wellbeing. Plus, high environmental standards will be essential to achieve a green economic recovery as we continue the move out of lockdown. Throughout the reporting year, the SOC supported **Scottish Environment LINK** by publicising its campaigns via our social media channels.

Since 2018, **Fight for Scotland's Nature** campaign has called on the Scottish Government to set legally binding targets to halt the rapid decline of Scotland's nature and set it on track to recovery. In October, we publicised the launch of the campaign's petition calling for strong laws to protect Scotland's nature after Brexit.

**The Scottish Ornithologists' Club**  
Published by Rosie Filipiak · 21 July 2020

Most of us have fully embraced nature over the last few months, maybe time now to make sure what we have enjoyed gets protected? Read how you can help below.

**Scottish Environment LINK**  
13 July 2020

The need for a green economic recovery makes strong post-Brexit environmental protections more important than ever. So are the Scottish Government's plans, outlined in its EU Continuity Bill, up to scratch?

**The Scottish Ornithologists' Club**  
Published by Tricia Burnet · 2 October 2020

Fight for Scotland's Nature campaign has just launched a petition calling for strong laws to protect Scotland's nature after Brexit: [www.fightforscotlandsnature.scot/petition](http://www.fightforscotlandsnature.scot/petition). You might like to read this and decide whether you would like to sign the petition.

SCOTLINK.EACTION.ONLINE

**Sign the petition to protect Scotland's nature**  
Tell the Scottish government we need strong laws to protect our a...

728	50	-
People reached	Engagements	Distribution score

4ZOPK-CxoFzTW\_t93nNhhcWIEABo3PyQW9lb9SY

[Boost post](#)

In March, LINK was preparing to contact every Holyrood election candidate from the five main parties, asking them to pledge to champion Scotland's nature if elected to parliament.

**The Scottish Ornithologists' Club**  
Published by Shenaz Khimji · 16 March

**SCOTTISH ENVIRONMENT LINK: NATURE CHAMPION PLEDGE**  
The candidates we elect to Holyrood on May 6th 2021 are vital in shaping the future of Scotland's natural heritage. Let's ask our politicians to pledge to champion nature by taking action through supporting Scottish Environment LINK's campaign, add your name to an online map to support the Nature Champion pledge here: <http://scotlink.org/holyrood>. Using this map, Scottish Environment LINK will convey to politicians, from each of the five main parties, public backing for nature in their region of Scotland. Make your voice heard, support the Nature Champion pledge.

531	24	-
People reached	Engagements	Distribution score

[Boost post](#)



## PROMOTING THE CONSERVATION OF BIRDS AND THEIR HABITATS IN SCOTLAND (CONT)

### LOCHWINNOCH 'BOXIES FOR BARNIES'

This project, led and part-funded by the SOC Clyde branch, involved working closely with volunteers and land owners in the local community to create a total of 19 Barn Owl nest boxes, installing them mainly in farm buildings (occasionally in trees) around Renfrewshire, and monitoring them during the breeding season.

All records were entered on BirdTrack and landowners given information on how to manage their sites to continue to help the birds. For more information on the project, see *Scottish Birds Vol 41 (2)* pp. 148-9.





## PROVIDING A FOCUS FOR INFORMATION RELATING TO THE STUDY OF BIRDS

*We are Scotland's hub for information on ornithology, providing vital resources for enthusiasts and researchers doing important work on bird conservation and protection. We do this most visibly through the SOC library, our publications, conferences, and the SOC website.*

### MAINTAINING OUR EXTENSIVE LIBRARY, ARCHIVES AND BOOK SHOP

While Waterston House was closed to visitors during the two COVID-19 lockdowns, in-person visits to the SOC library were not possible. However, a number of users wishing specific material were still able to email their requests to the Librarian and receive information and/or scans of articles via post or email.

During a year when receipt of our library exchange journals has been a little irregular, great efforts have been made to follow up missing issues to maintain complete runs. The local bird reports from each of the geographic areas of Scotland remain an important part of our collection, which is the only complete collection available to the public to browse.

The archive received a variety of interesting donations in 2020/21. These included: historical records of birds in the Loch Lomond area; the late Dr Mike Madders' Coll and Tiree notebooks; draft material for *The Birds of Fife*; photographs of upland birds taken in the mid-1950s by Harold Auger; and slides of Dunbar Harbour Kittiwake colony taken in 1968 by David Saunders as part of Operation Seafarer.

The SOC library and archive catalogues are available to download from the [Library page](#) of the SOC website.

We continued to receive donations of second-hand books for our shop, and despite the months of closure, sales of these raised £357 for Club funds.



Waterston House shop - creating space to keep visitors safe



## PROVIDING A FOCUS FOR INFORMATION RELATING TO THE STUDY OF BIRDS (CONT)

### SCOTTISH BIRDS – REACHING OUT DURING THE PANDEMIC

#### 32 peer-reviewed papers and notes published

Four issues of *Scottish Birds* were published in the reporting period. The Club's quarterly journal is regarded as the leading authority on Scottish ornithology. One of the great strengths of the publication is the diversity of its content, with each issue covering research papers and notes, birding articles and observations, and Club news and views. A single issue (issue 4 of volume 40) presented papers on the BTO's work on generating population trends in breeding birds, long term studies of colonies of Eider and Great Black-backed Gull, Scotland's first breeding Little Egrets, and notes on the occurrence of a host of rarities including White-chinned Petrel, Green Warblers, Scopoli's Shearwater and Wilson's Petrels.

In April, a decision was made by Council to make a PDF version of the March 2020 issue of *Scottish Birds* available for free to the wider birding community, as a goodwill gesture to birders everywhere as the country was plunged into lockdown. The Facebook post announcing the giveaway issue reached 20,000 people, attracted 1400 likes, was shared 275 times, and prompted over 80 comments – the highest reach and engagement of any single SOC post to date. So it is fair to say that the gesture was well received. It was also a signal to the Birding and Science Committee that it was on the right track with its plans to offer a digital version of the journal to members.

We also continued to host the *Online Scottish Bird Report* on our website, a constantly updated database of birds observed in Scotland. The database now holds over 180,000 species records from more than 700 bird reports. Material from local avifaunas and other (non-report) publications are now also being added.



### THE HOOT

Production of *The Hoot*, our members' e-digest, continued on a quarterly basis. In acknowledgement of the travel restrictions, the focus of content was slanted towards birding locally, with features on urban predators, local patch birding and garden birds, for example. The summer 2020 issue included an item from a member explaining how the constraints of early lockdown's permitted local 'exercise hour' had given her a renewed appreciation of the birds in her nearby city park.

*This was a wonderful read. Not a graph in sight. Thank you so much for that. Just plain clear descriptions of the birds and their lives. Fabulous.*

Ros Docherty, *The Hoot* | Autumn 2020 | Issue 15



## PROVIDING A FOCUS FOR INFORMATION RELATING TO THE STUDY OF BIRDS (CONT)

*Thank you again for a fascinating 'Hoot', the murmurations video was spellbinding. The Hoot is always looked forward to in my house and never disappoints.*

Grace MacKinnon, *The Hoot* | Winter 2020/21 | Issue 16

### VIRTUAL SOC ANNUAL AGM EVENT, 21 NOVEMBER 2020

Although we left the decision to cancel our booking with the Atholl Palace Hotel as late as possible in the hope that we would be able to go ahead, the situation with the spread of COVID-19 was looking less and less encouraging so a decision was made in early autumn to organise an online AGM event that would include a guest speaker and a quiz. Just over 100 people booked for the event, which opened in the afternoon with a warm welcome from SOC President, Ian Bainbridge, before handing over to guest speaker, Nigel Clark, to present his fascinating talk on the plight of the Spoon-billed Sandpiper, which was very well received. The event closed with the presentation of this year's SOC Branch Recognition Awards, which went to Alex Joss (Highland) and Ian Francis (North-East Scotland). For full coverage of the event, see *Scottish Birds* Vol 41 (1) pp. 38-41.



*The focus of the 2020 AGM event – the plight of the Spoon-billed Sandpiper © LI Yunfeng*

### VIRTUAL SCOTTISH BIRDPWATCHERS' CONFERENCE, 27 MARCH - 3 APRIL 2021

We had also planned the Scottish Birdwatchers' Conference, organised by BTO Scotland and Moray Bird Club (SOC Moray branch), scheduled to take place on 21 March at Elgin Town Hall. Unfortunately, owing to the ongoing COVID-19 restrictions, we had to cancel this sold-out event yet again but we hope to get to Elgin in March 2022. In the meantime, for the 2021 event, a virtual programme of talks was organised spread over two Saturdays (27 March & 3 April), with an enjoyable mid-week evening quiz in between. The event attracted almost 400 bookings and an excellent turnout at each session, which included time at the start for some chit chat among attendees as they settled in for the afternoon. Participants were treated to a wide range of talks, from the impact of lead poisoning in birds (Rhys Green) to the birding delights of Tiree (John Bowler). For the full conference write-up, see *Scottish Birds* Vol 41 (2) pp. 138-143.









## ENCOURAGING THE APPRECIATION OF THE CREATIVE ARTS RELATING TO NATURAL HISTORY

*Our art gallery, named after wildlife artist Donald Watson, is one of the jewels of Waterston House. It's a favoured venue for many of the UK's leading wildlife artists, all with a shared love of depicting the natural world.*

With the physical gallery at Waterston House closed for much of the reporting period owing to the pandemic, this necessitated a quick and creative switch to online channels to continue delivering the wildlife art element of our charitable activities. This not only proved an apt response to the circumstances but it has also given us new tools for the future and helped us grow our audience.

As lockdown struck, the exhibitions due to take place were re-scheduled or cancelled. This provided the opportunity to establish an Online Art Shop, which was launched in June. Its immediate success while lockdown still prevailed was truly cheering. We have since grown to appreciate its importance not only as a stop-gap (both in terms of outreach and income) during this fallow time but as a long-term tool to support our art activities. Indeed, the online shop offers a more permanent portfolio of top wildlife art than our ever-changing exhibition programme. This helps us convey our aims to any visitor to the SOC website, giving them a clear sense of our ambitions in this area. It also enables us to reach a much wider audience than we are able to do with the physical gallery. Over half of the online art buyers are based outside our natural base (Edinburgh and Lothians) and these have included some overseas customers.



*The Difficulty of Hatching, Shearwater – a graphic story, p3, by Adele Pound, part of our themed 'Eggs-hibition' on social media, April 2020*



We re-opened Waterston House to the public from August, following the Scottish Government's guidelines for the re-opening of non-essential retail outlets and galleries. In total, we were open for five months during this financial year and in this time, we welcomed approximately 2000 visitors and hosted two extended exhibitions, which generated total sales of just under £14,600. The first show, 'Coastal Birds', presented the work of three artists, winners of bursaries from the Society of Wildlife Artists (SWLA): Liz Myhill, Emily Ingrey-Counter and Helen Kennedy. Supporting bursary winners helps nurture the next generation

## ENCOURAGING THE APPRECIATION OF THE CREATIVE ARTS RELATING TO NATURAL HISTORY (CONT)

of wildlife artists while showcasing the work of newcomers to our audience. The Autumn exhibition showed the work of Robert Greenhalf, a regular SOC exhibitor, alongside two new exhibitors for the gallery, established printmaker Matt Underwood and sculptor Anthony Theakston. This exhibition by well-known artists was rewarded by healthy sales. It was extended, as the planned Christmas show was cancelled owing to the second lockdown, which saw the gallery close from the end of December through the first quarter of 2021. As with the first lockdown, the online shop helped us maintain a connection with our audience and helped to plug the gap of lost exhibitions' income. Total income from the online art sales was £8.5k in the reporting year.

Social media channels became a crucial platform for delivering our wildlife art communications. The reach of our social media increased greatly during the period (Fig 2, p16) and art was an important part of the content we offered to achieve this result. We featured a different artist each week, linking their work, when relevant, to seasonal themes (migration, nesting, etc.). Instagram has become particularly focused on art and continues to grow an audience for this specific content, with around 900 followers at the time of writing. By meeting the need that the lockdowns created for social media content, we have developed and retained a larger audience for the Club.



Visitors to the Coastal Birds exhibition, summer 2020 © Laura Gressani





## FINANCIAL REVIEW

The Club generated a surplus for the year of £102,004 (2020: deficit of £116,580). The total income amounted to £206,625 (2020: £264,755), of which £Nil (2020: £14) was related to restricted projects and £206,625 (2019: £264,741) to unrestricted funds. The surplus position is due to the recovery in value of investments which have risen in value during the year by £110,812. Excluding this, the Club had an operational deficit of £8,808 (2020: £55,339).

It is of course difficult to draw meaningful comparison of the current year's financial position with prior years as the coronavirus pandemic has inevitably impacted income streams from charitable activities. The Club has earned little more than 10% of normal income from these sources in the current year. Additionally, legacies are down on the relatively low prior year amount at £1,500 (2020: £8,000). However, on a more positive note, it is pleasing to see membership subscriptions increasing by around £4,000 and donations up by c.£9,000 for the year.

There has also been a corresponding impact on expenses during the year due to the closure of Waterston House and curtailment of many Club activities. The Government furlough scheme offset a large proportion of staff costs and many other costs were significantly reduced during this time. The Club successfully applied for support in the form of a £37,000 grant from East Lothian Council, and this has eased the financial burden to a great extent. It is, however, a one-off grant for 2020.

Encouragingly, since we reopened Waterston House in April 2021, the Club has seen a high level of footfall in the building, shop and at organised events, e.g. the optics demonstrations. This augurs well for an upturn in income from Club and charitable activities in the new financial year.

At 31 March 2021, the market value of investments held was £594,057 (2020: £448,737). Investment income from dividends was down once again to £13,718 (2020: £16,435) and our investment manager has projected a similar decrease in the current year as companies retain earnings for growth and recovery as opposed to payment of cash dividends.

At the balance sheet date, the unrestricted reserves were £882,111 (2020: £834,372), including designated funds of £371,051 (2020: £326,041), with £629,995 (2020: £575,730) in restricted funds.

### INVESTMENT POLICY AND PERFORMANCE

In 2014, SOC Council appointed Brewin Dolphin as investment managers under their discretionary managed scheme. Under this scheme, Brewin Dolphin is responsible for the investment decisions, guided by SOC's investment policy. The Hon. Treasurer meets annually with the company to review the stocks held on the Club's behalf. Broadly, the SOC seeks to support ethical and environmental enterprises and not to invest in anything which conflicts with the Club's aims and objectives. Brewin Dolphin is entrusted to implement this policy to the best of its ability, given the complex nature of some investment funds. The performance of investment managers is formally reviewed annually, although a report on the performance of Club investments is received on a quarterly basis.



FINANCIAL REVIEW (CONT)

The SOC is reliant on membership subscriptions, sales and donations for its activities. Investment assets are held as reserves. The Club seeks to produce the best financial return within an acceptable level of risk, which is reviewed annually.

The investment objective for the long-term reserves is to generate a return in excess of inflation over the long term, whilst generating an income to support the on-going activities of the Club.

The investment objective for the short-term reserves is to preserve the capital value with a minimum level of risk. Assets should be readily available to meet unanticipated cash flow requirements.

The value of investment holdings at 31 March 2021 was £594,057 (2020: £448,737). Last year the value of the investments had been negatively impacted by falls in global markets due to COVID-19. Although values continued to fall post 31 March 2020, and fluctuated during the remainder of the year, the first quarter of 2021 has shown steady recovery to pre pandemic levels. Figure 5 displays the performance of the Club's investments against the benchmark agreed with Brewin Dolphin.

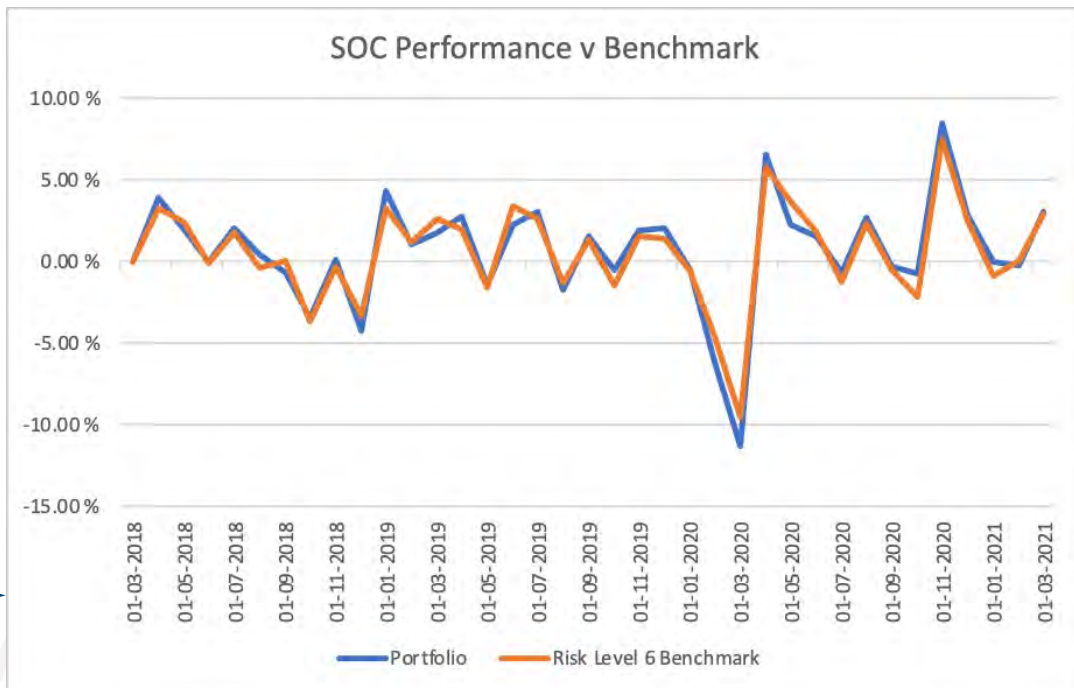


Fig 5: SOC investment performance

## FINANCIAL REVIEW (CONT)

### RESERVES POLICY

The Club's total funds are comprised of restricted funds and endowments and unrestricted funds.

Restricted funds include the Property Endowment Fund, which is held to ensure the existence of a Centre for Ornithology in Scotland and also an Endowment Fund (of which a proportion is restricted).

Examples of unrestricted funds include our general fund and the proportion of the Endowment Fund which is not restricted.

Unrestricted Reserves are that part of the Club's unrestricted funds which are freely available to spend on any of our charitable activities. At present, there are no short-term requirements in respect of capital items that cannot be covered by current bank balances.

The funds available for reserves are all unrestricted funds less Fixed Assets (building, furniture etc.) or funds that are "designated" within the unrestricted funds. An example of the latter being the *Birds of Scotland Fund* (BS3), which is designated specifically to be spent on publications, approved by the BS3 Fund Committee.

Based on the definitions above, the Target level of Reserves for the Club is set at £219,668.

This is the amount that should be readily available to meet any unanticipated falls in income streams and/or unanticipated expenditure. It is a sum which, at present, would cover eight months of Club expenditure.

### RISK MANAGEMENT

As was reported in the Club's Annual Report last year, Council maintains a comprehensive register of the various risks that the Club needs to manage. This register was particularly useful in a period when, due to the impact of the pandemic, Waterston House was not being used as it had been, and the Club depended more heavily on its IT infrastructure. The register helped provide focus for the Management Committee on the reporting that it needed to ensure adequate steps were being taken to mitigate property risks, secure the Club's internal and external communications and its continued compliance with the applicable regulatory framework.



## OUR FUTURE PLANS

One item that we had planned to progress this year was our Communications Strategy. However, the coronavirus outbreak resulted in a shift of priority, with staff devising a set of COVID-19 communications guidelines early on as part of the effort to continue to keep in touch with members and the wider birding community in the absence of being able to deliver in-person activities. As things start to open up again and we look forward to resuming normal Club activities, such as branch indoor meetings and conferences, Council's Strategic Planning Group will be reconvening over the course of 2022 to pick up where it left off prior to the pandemic, with the Communications Strategy a key priority.

Having seen the many positive benefits of delivering talks and conducting meetings via video conference, a hybrid of in-person and online events is something that we will be looking to continue.

The Birding and Science Committee has made great strides towards the delivery of its diverse aims, and key to this in the reporting year was Council's approval in November of the recommendation brought by the Committee to appoint a full-time Birding and Science Officer from late spring 2021. The appointment will allow the Club to carry forward important projects such as an assessment of knowledge gaps for Scotland's birds, with the appointee serving as a vital point of contact for the local bird recorders, bird report committees and branch representatives, as well as seeking out partnerships with other environmental organisations to develop training and survey opportunities, for example. We look forward to hosting the next Bird Recorders' Conference in summer 2022.

The transfer of knowledge will be a key focus across our activities over the coming years. Work has already begun in this vein, with an exciting Youth Events Programme in place for the winter 2021-22 period, working in partnership with BTO Scotland. The aim is to put the next generation of ornithologists in touch with experts who can share their experience and knowledge and hopefully equip and inspire young people to take the next step and turn their passion into a career in bird conservation. Alongside such programmes, plans are underway to launch a mentoring scheme.

All our plans require resources and the SOC's Finance Committee has already started to review and enhance our budgeting and forecasting process. Whilst we could not have predicted the events of this reporting year, we can at least ensure that robust procedures exist to mitigate bumps in the road and control expenditure within reasonable limits. We will also be reviewing membership subscription levels in early 2022 with a view to rolling those out for renewals later in the year.

Navigating the COVID-19 pandemic brought about a new way of operating at HQ, with the switch to a hybrid of home and office working resulting in staff having more clearly defined roles and able to prioritise these. The gradual approach taken to re-opening Waterston House from August led to the realisation that a shift to opening five days a week instead of seven allowed us to provide a dedicated front-of-house rota, which has greatly enhanced the visitor experience.

Thanks to the commitment of staff and volunteers, and continued support from members and donors, we are in a strong position to meet the challenges ahead.





# STRUCTURE, GOVERNANCE & MANAGEMENT

## GOVERNING DOCUMENTS

During the reporting period, the SOC operated under the Charity's **Constitution** as a Scottish Charitable Incorporated Organisation (SCIO), number SC009859. No changes were made to the document in the reporting year. In light of the COVID-19 restrictions on gatherings, provision was made by the Government in 2020 allowing organisations to hold their Annual General Meetings online instead of in person, irrespective of such provision in governing documents. In the case of the SOC, there was no such provision and plans are afoot to amend the Club's constitution at the next in-person AGM in order to allow for virtual members' meetings in the future.

Branch AGMs originally scheduled for April 2020 were rescheduled for the autumn or early in the new year/spring of 2021 and hosted via Zoom, with the exception of West Galloway, whose Chair opted for a 'garden AGM', scheduled for May 2021. Owing to the small size of the branch, an in-person meeting that was restricted to the maximum number of people permitted to meet outdoors (six) was feasible.

## MEMBERSHIP

Membership of the SOC is open to anyone with an interest in Scottish ornithology and who is in agreement with the objectives of the Club on payment of an annual subscription. Members are entitled to voting rights. Annual subscription rates are set by Council and may be revised at Council's discretion. We were very sad to lose several well-known figures in the Club during the year, among them SOC Honorary President, Frank Hamilton, and Honorary members and SOC stalwarts, Daphne Peirse-Duncombe and Dougal Andrew.

## APPOINTMENT OF TRUSTEES

Council members are the Trustees and they are responsible for the management of the Club and the safeguarding of its assets. Office bearers and Elected Members are recruited to Council via its Appointments Panel, with a view to cultivating a mix of skills and experiences across a broad range of relevant disciplines. Branch Representatives are appointed via the individual branches at their local AGMs. All The Trustees are elected, appointed or co-opted in accordance with the terms of the Club's constitution. At this year's SOC AGM in November, Prof Will Cresswell kindly agreed to continue on as Elected Member of Council for a further three-year period. We are grateful to Will for his commitment and wise counsel. We were pleased to welcome a new branch representative to Council – Rachael Wilbourn (Tayside branch secretary from December).

## TRUSTEES' INDUCTION AND TRAINING

New Trustees are often already familiar with the practical work of the SOC but are provided with an induction email, which offers guidance on the roles and responsibilities of being an SOC Trustee. Ongoing support and guidance is provided via the Club Administrator.

## STRUCTURE, GOVERNANCE & MANAGEMENT (CONT)

### ORGANISATIONAL STRUCTURE

The Trustees meet regularly to oversee the operation of the Club and determine its strategic direction and policies. During the reporting year, all meetings were held via video conference, owing to COVID-19 restrictions. A scheme of delegation is in place whereby the day-to-day responsibility for operation and administration rests with the staff.

Fortunately, we only had to part-furlough our weekend front-of-house staff member, Stuart Rivers, during the first lockdown, with the rest of the team able to carry out their duties from home. Homeworking for staff who had previously had to juggle administrative and front-of-house duties meant that there was capacity within the existing team to be able to cover the communications role, following the premature departure at the start of the pandemic of Alyssa Parker, who had been providing maternity cover for SOC Development Officer, Jane Allison. Membership Officer Kathryn Cox took on the additional role of Website Editor, and Rosie Filipiak ably covered branch communications and social media as well as continuing as Librarian and Editor of the *The Hoot*.

Preparation for the big re-opening of Waterston House in August involved a plan for how to make best use of staff resources available in light of new roles and the strict COVID-19 measures in place at the time. The result was a decision to open on a part-time basis with a dedicated front-of-house team comprising Stuart Rivers (Birding Officer), Rosie Filipiak (Librarian) and Laura Gressani (Exhibitions). Following Stuart's resignation in October, we recruited Shenaz Khimji as Visitor Experience Officer to welcome the weekend visitors.

### COUNCIL'S RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS

Council is responsible for preparing an annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in Scotland requires Council to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the Club at the end of the year and of the profit or loss for the year then ended. In preparing those financial statements, Council is required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Association will continue in business.



## STRUCTURE, GOVERNANCE & MANAGEMENT (CONT)

Council is responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Club and to enable it to ensure that the financial statements comply with the Charities and Trustee Investment (Scotland) Act 2005 and Charities Accounts (Scotland) Regulations 2006 (as amended) and the provisions of the Associations constitution. Council is also responsible for safeguarding the assets of the Club and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Furthermore, Council is responsible for the maintenance and integrity of the Club and financial information included on the SOC website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.



## THANK YOU

*In addition to members of Council and its sub-committees and all those who volunteer their time to run our 15 branches, the Club depends on the support and generosity of all of our members, volunteers and donors.*

- Thank you to the late Margaret Mylne and John Savory for the gifts they left to the Club in their Wills. Thank you also to the family and friends of the late Ann Lawson for the funeral collection for the SOC and to the family of Norman Elkins for their gift to the Club to mark Norman's 80th birthday.
- Thanks to Les Kingston and Tom Palmer for their generous donations, and to everyone else who kindly gave using the donate button on our website or who donated books to the library or book shop.
- We couldn't run Waterston House without our volunteers who gave of their time during this past year. Thanks to Marjorie & Mike Adams, Trish Burnet, Beng Cheah, Lesley Creamer, Stan da Prato, Ian Elfick, Gordon Elliott, John Harrison, Eileen Henderson, Margaret Hyne, Stephen Hunter, Tricia McBride, Jean & Bill Torrance, and Stephen Welch.
- Thanks must also go to the many experts who gave up their time to provide virtual talks to our branches and conferences.

## THANK YOU (CONT)

**Winter Talks Programme:** Kenny Taylor, Sandy McNeil, Andrew Stevenson, Dan Brown, John Miles, Jeremy Greenwood, John Calladine, Ben Darvill, Chris Bailey, George Smith, David Jardine, Andrew Bielinski, Brian Smith, Bob Swann, Dr Ben Swallow, David Anderson, Stan da Prato, Edmund Fellowes, Al McNee, Prof Jeremy Wilson, John Harrison, John Rogers, Paul Anderson, David Steel, Justin Grant; Yvonne Stephan, Simon Gillings, Ally Lemon, Paula Baker, Mark Johnston, Dr Mark Eaton, Steve Willis, John Wilson, Neil Gray, Stephen Rutt.

**SOC AGM Event:** Nigel Clark

**Scottish Birdwatchers' Conference:** Prof Rhys Green, Dr John Bowler, Alison MacLennan, Prof Juliet Vickery, Dr Chris Hewson, Mark Lewis.

- SOC members around the country give hundreds of hours each year to monitoring birds as part of organised local and national surveys or as independent observers, submitting information that is vital to bird conservation to their local bird recorders and via BirdTrack. Thank you to all those who managed to get out into the field to undertake this monitoring when COVID-19 regulations allowed.
- For their support and collaboration, thank you to: BirdLine Scotland, BTO Scotland, *British Birds*, Cameron Bespolka Trust, *East Lothian Life*, Isle of May Bird Observatory Trust, Jim Jeffrey (SNH), Mapbox, RSPB Scotland, *Scottish Field*.
- Finally, for their help with compiling this report, thank you to: Waterston House staff, SOC office bearers, Council and Branch committee officials, Lisa Douglas (Creative Link) and Whitelaw Wells.

This report along with the financial statements have been prepared in accordance with the accounting policies set out in Note 1 to the accounts and comply with the SOC's constitution, the Charities and Trustees Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended) and the Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019).

Approved by Council on 1 November 2021  
and signed on its behalf by Ian Bainbridge (President)







# REFERENCE AND ADMINISTRATIVE INFORMATION

**Charity name:** Scottish Ornithologists' Club (known as 'SOC')

**Charity Registration number:** SC009859

**Registered office & operational address**

Waterston House  
Aberlady  
East Lothian EH32 0PY

**Office bearers**

President: Ian Bainbridge  
Vice-President *Birding and Science*: Jeremy Wilson  
Vice-President *Management and Infrastructure*: Lesley Creamer  
Honorary Secretary: David Lindgren  
Honorary Treasurer: Andrew Thorpe  
Office bearers are also members of Council

**Council-elected members elected at Club AGM (year of election/re-election):**

Will Cresswell (2020)  
Bob McGowan (2018)  
Chris Wernham (2019)

**Elected at branch AGMs:**

Ayrshire – David Rackham  
Borders – Neil Stratton  
Caithness – Nina O'Hanlon  
Central Scotland – Rick Goater  
Clyde – Zul Bhatia  
Dumfries – Alex Banwell  
Fife – Elizabeth Irwin  
Highland – Pete Gordon

Lothian – Richard Leslie  
Moray – Richard Somers-Cocks  
North-East Scotland – Alan Knox  
Orkney – Helen Aiton  
Stewartry – Jeremy Brock  
Tayside – Rachael Wilbourn  
West Galloway – Geoff Sheppard

**Honorary Presidents**

Roy Dennis  
Frank Hamilton (passed away September)

**Honorary members**

Dave Allan  
Dougal Andrew (passed away March)  
Ian Andrews  
Stan da Prato  
Iain Gibson  
Mike Harris

Angus Hogg  
Andrew Macmillan  
Vicky McLellan  
Daphne Peirse-Duncombe (passed away February)  
Ron Summers



## REFERENCE AND ADMINISTRATIVE INFORMATION (CONT)

### Independent examiner

Louise Presslie CA  
Whitelaw Wells Chartered Accountants  
9 Ainslie Place  
Edinburgh EH3 6AT

### Solicitors

Morton Fraser LLP  
Quartermile Two  
2 Lister Square  
Edinburgh EH3 9GL

### Bankers

Royal Bank of Scotland  
Edinburgh West End Office (C) Branch  
142-144 Princes Street  
Edinburgh EH2 4EQ

### Investment advisors

Brewin Dolphin Ltd  
Sixth Floor, Atria One  
144 Morrison St  
Edinburgh EH3 8BR

### Staff

Club Administrator: Wendy Hicks  
Development Officer: Jane Allison  
Communications Officer & Librarian: Rosie Filipiak  
Finance Officer: Mairead Lyons  
Membership Officer & Website Editor: Kathryn Cox  
Art Exhibitions Coordinator: Laura Gressani  
Birding Officer: Stuart Rivers (to November)  
Shenaz Khimji: Visitor Experience Officer (from November)  
Contract Bird ID Skills Trainer: Scott Paterson

## CLUB COMMITTEES

### Management Committee

Chair and Vice-President *Management and Infrastructure* – Lesley Creamer, Hon. Secretary – David Lindgren, Hon. Treasurer – Andrew Thorpe, SOC Library Chair – Alan Knox (ex officio), members – Caroline Gordon, Fiona McLean, Ian Bainbridge (President, ex officio)

### Finance Committee

Hon. Treasurer and Chair – Andrew Thorpe, members – Alex Banwell, David Lindgren

### Birding and Science Committee

Chair and Vice-President *Birding and Science* – Jeremy Wilson, members – Ian Andrews (*Scottish Birds*), Ian Bainbridge (President, ex officio), Bob McGowan (Birds of Scotland Fund), Stuart Rivers (Birding Officer, ex officio, to November), Ron Summers (Research and Surveys Committee), Chris Wernham, Mark Wilkinson (SBRC)

### Scottish Birds Editorial Committee

Coordinating Editor and Chair – Ian Andrews (to December) then Harry Scott (from January), Editor: Peer-reviewed papers – Stan da Prato (assisted by Ian Bainbridge, Mick Marquiss, Clive McKay, Will Miles and Bob Swann; Editors: Articles – Jimmy Maxwell (passed away August), Andrew Barker (from January), Harry Scott, Stuart Rivers, Mark Wilkinson (from March), Maps & Graphs – Ian Andrews, Book Reviews – Nick Picozzi, Proof readers: Ed Austin, Dr J Frank, Bridget Khursheed (from March), Indexer: Jean Torrance (from March).

## REFERENCE AND ADMINISTRATIVE INFORMATION (CONT)

### **Library Committee**

Chair – Alan Knox, Archivist – Ian Elfick, members – David Clugston, Lesley Creamer, Norman Elkins (to November), John Law, Bob McGowan

### **Research and Surveys Committee**

Chair – Colin Corse, members – Mike Bell, Raymond Duncan, Rob Furness, Les Hatton, Ron Summers

### **Scottish Birds Records Committee (SBRC)**

Chair – Mark Wilkinson, Secretary – Chris McNerny (non-voting), Bob McGowan (Museum Consultant – non-voting), members – Jim Dickson, Rob Fray, Mark Lewis, David Pullan, David Steel, Mark Warren

### **SBRC Scottish List Subcommittee**

David Clugston, Ron Forrester, Angus Hogg, Bob McGowan, Chris McNerny, Roger Riddington

### **The Birds of Scotland Fund Committee**

Co-Chairs – Bob McGowan and Chris McNerny, members – Will Cresswell (SOC Council), Jeremy Wilson (Vice-President *Birding and Science*)

## BRANCH COMMITTEES

**Ayrshire** Chair – Brian Lennox, Vice-Chair – Andy Shand, Secretary – Anne Dick, Treasurer – John Drummond, members – Roger Hissett, Norman Lawrie, David Rackham, Tony Scott, Jim Thomson

**Borders** Chair/Treasurer – Martin Moncrieff, Secretary – Neil Stratton, members – Tom Brewis (from September), Richard Jackson (from November), David Parkinson, Malcolm Ross, Harry Urquhart (from September)

**Caithness** Chair – Donald Omand, Vice-Chair – Julian Smith, Secretary – Nina O'Hanlon, Treasurer – Eric Maughan

**Central Scotland** Chair – Rick Goater, Treasurer/Secretary – Neil Bielby, members – Roger Gooch, Roger Stewart, Ken Wilkinson, Chris Pendlebury (ex-officio, Upper Forth Recorder)

**Clyde** Chair – Zul Bhatia, Secretary – Ian Fulton, Treasurer – Liz Parsons, members – Emma Anderson, Rebecca Dickson (from September), Iain Gibson, Fiona McLean, Sandy McNeil, David Palmar, Andrew Russell, Kevin Sinclair, Donald Wilson, Toby Wilson

**Dumfries** Chair – John Riddet, Secretary – Lesley Creamer (to September), then Alex Banwell, Treasurer – Alex Banwell, members – Monica Callander (to September), Drew Davidson, Christine Dudgeon, Edmund Fellowes, Heather Stevenson (from September), Robin Thomson, Andrew Turney (from September 2020)



## REFERENCE AND ADMINISTRATIVE INFORMATION (CONT)

**Fife** Chair – Elizabeth Irwin, Secretary – Caroline Gordon, Treasurer – John Irwin, members – Elizabeth Adams (to September), Rob Armstrong, Norman Elkins (to September), Andy Falconer, David Heeley (from September), Rodger Neilson (to September), Andrew Riches

**Highland** Chair – Carol Miller, Secretary – Kathy Bonniface (to August) then Mary Galloway, Treasurer – Lynda Graham (to August) then Alister Clunas, members – Jonathan Clarke, Alister Clunas (to August), Peter Gordon, Alex Joss, Bob McMillan, Al McNee, John Poyner (ex officio as Recorder), Susan Seright

**Lothian** Chair – Richard Leslie, Secretary – Alison Creamer, Treasurer – Stephen Hunter, members – Gillian Herbert, Anne Hyatt, Hilary Maxfield, David Parmee (from September), Gill Parmee, Mike Thornton

**Moray** Chair – David Law, Secretary – Alison Ritchie, Treasurer – Frank Ritchie, members – Martin Cook, Melvin Morrison, Richard Somers Cocks, Alastair Young

**North-East Scotland** Chair – Alan Knox, Secretary – John Wills, Treasurer – Paddy Grant, Members – Hugh Addlesee, Ian Broadbent (ex officio as Recorder), Mark Lewis, Mark Sullivan

**Orkney** Chair – Colin Corse, Secretary/Vice-Chair/Treasurer – Helen Aiton

**Stewartry** Chair – Jeremy Brock, Vice-Chair – Peter Swan (to September) then Mark Pollitt, Joint Treasurer – Peter Swan (to September) then Leslie Fortune, Secretary/Joint Treasurer – Joan Howie, members – Ian Bainbridge (to September), Andrew Bielinski (to September), Mark Pollitt (to September), Graham Smith, Val Smith (from September)

**Tayside** Chair – John Campbell (to January) then Anne Reid, Treasurer – Brian Brocklehurst (to January) then Stuart Will, Secretary – Brian Brocklehurst (to December) then Rachael Wilbourn, members – Jon Cook, Ron Downing, Maria O'Neill, Scott Paterson (ex officio as Recorder), Mike Sedakat, Rachael Wilbourn (from Oct to December)

**West Galloway** Chair – David McGhie, Vice-Chair – Alan Johnstone, Secretary/Treasurer – Geoff Sheppard, members – Sandra Alder, Jean Sheppard

### LOCAL BIRD RECORDERS

Angus and Dundee – Jon Cook; Argyll – Jim Dickson, Assistant – Malcolm Chattwood; Ayrshire – Fraser Simpson, Assistant – Angus Hogg; Borders – David Parkinson and Martin Moncrieff; Caithness – Sinclair Manson; Clyde – Iain Gibson, Assistant – Val Wilson; Clyde Islands – Bernard Zonfrillo; Dumfries and Galloway – Paul N Collin; Fair Isle – David Parnaby; Fife – Graham Sparshott; Forth (Upper) – Chris Pendlebury, Assistant – Neil Bielby; Highland – John Poyner; Isle of May – Iain English; Lothian – Stephen Welch; Moray and Nairn – Martin Cook; North-East Scotland – Ian Broadbent; Orkney – Russ Neave and Emma Neave-Webb; Outer Hebrides – Yvonne Benting; Perth and Kinross – Scott Paterson; Shetland – Rob Fray





## INDEPENDENT EXAMINER'S REPORT TO SOC COUNCIL AND MEMBERS

### YEAR ENDED 31 MARCH 2021

I report on the financial statements for the year ended 31 March 2021 set out on pages 42 to 55.

#### Respective responsibilities of the Council members and the Independent Examiner

As described in Council's Annual Report, Council members (the Trustees) are responsible for the preparation of the financial statements in accordance with the terms of the Charities and Trustees Investment (Scotland) Act 2005 and the Charities Accounts (Scotland) Regulations 2006 (as amended). The Club's Trustees consider that the audit requirements of Regulation 10(1) (a) to (c) of the Accounts Regulations does not apply. It is my responsibility to examine the financial statements 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 report

My examination was carried out in accordance with Regulation 11 of The Charities Accounts (Scotland) Regulations 2006 (as amended). An examination includes a review of the accounting records kept by the Club and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seek explanations from you as Council members concerning 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:

- 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 Charities and Trustee Investment (Scotland) Act 2005 and Regulation 4 of the 2006 Accounts Regulations (as amended); and
  - To prepare accounts which accord with the accounting records and comply with Regulation 8 of the Charities Accounts (Scotland) Regulations 2006 (as amended) 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.

*Louise Presslie*  
Louise Presslie C.A.  
Whitelaw Wells Chartered Accountants  
9 Ainslie Place  
Edinburgh EH3 6AT

Date: 1 November 2021



## STATEMENT OF FINANCIAL ACTIVITIES

For the year ended 31 March 2021

	Notes	Unrestricted Funds £	Restricted Funds £	2021 Total £	2020 Total £
<b>INCOME AND ENDOWMENTS FROM:</b>					
Donations & legacies	2	134,594	-	134,594	125,277
Charitable activities	3	58,313	-	58,313	121,213
Other trading activities	4	-	-	-	1,830
Investment income	5	13,718	-	13,718	16,435
		<hr/>	<hr/>	<hr/>	<hr/>
<b>Total income</b>		206,625	-	206,625	264,755
<b>EXPENDITURE ON:</b>					
Raising funds	7	16,174	2,249	18,423	21,947
Charitable activities	7	197,010	-	197,010	298,147
		<hr/>	<hr/>	<hr/>	<hr/>
<b>Total expenditure</b>		213,184	2,249	215,433	320,094
<b>NET (LOSS) BEFORE GAINS AND LOSSES ON INVESTMENTS</b>					
		(6,559)	(2,249)	(8,808)	(55,339)
Net (loss) / gain on investments	9	54,298	56,514	110,812	(61,241)
		<hr/>	<hr/>	<hr/>	<hr/>
<b>NET MOVEMENT IN FUNDS</b>		47,739	54,265	102,004	(116,580)
<b>Total funds brought forward</b>		834,372	575,730	1,410,102	1,526,682
		<hr/>	<hr/>	<hr/>	<hr/>
<b>TOTAL FUNDS CARRIED FORWARD</b>		882,111	629,995	1,512,106	1,410,102
		<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

The notes on pages 44 to 55 form part of these financial statements.

## BALANCE SHEET

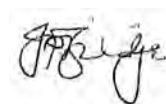
As at 31 March 2021

	Notes	£	2021 £	£	2020 £
<b>FIXED ASSETS</b>					
Tangible assets	8		835,860		850,016
Investments	9		549,057		448,737
			<hr/>		<hr/>
			1,388,034		1,298,753
<b>CURRENT ASSETS</b>					
Stock		10,454		6,325	
Debtors	10	22,185		17,261	
Cash at bank and in hand		100,984		94,123	
			<hr/>	<hr/>	
			133,623		117,709
<b>Creditors: amounts falling due within one year</b>	11	(6,434)		(6,360)	
			<hr/>	<hr/>	
<b>NET CURRENT ASSETS</b>			127,189		111,349
			<hr/>		<hr/>
<b>NET ASSETS</b>			1,512,106		1,410,102
			<hr/> <hr/>		<hr/> <hr/>
<b>FUNDS</b>					
Unrestricted funds	12		882,111		834,372
Restricted funds	12		629,995		575,730
			<hr/>		<hr/>
		=	1,512,106	=	1,410,102
			<hr/> <hr/>		<hr/> <hr/>

The financial statements were approved by Council on 1 November 2021

And signed on their behalf by Ian Bainbridge (President)

The notes on pages 44 to 55 form part of these financial statements.




## NOTES TO THE FINANCIAL STATEMENTS

**For the year to 31 March 2021**

### 1. ACCOUNTING POLICIES

#### Accounting conventions

The accounts have been prepared under the historical cost convention with items recognised at cost or transaction value unless otherwise stated in the relevant notes to the accounts. The accounts have been prepared in accordance with the Charities and Trustees Investment (Scotland) Act 2005, the Charities Accounts (Scotland) Regulations 2006 (as amended), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019) and Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) (effective 1 January 2019).

The Club has taken advantage of the exemption from the requirement to prepare a Statement of Cash Flows as permitted under FRS 102 and the Charities FRS 102 SORP.

The Scottish Ornithologists' Club constitutes a public benefit entity as defined by FRS102. Council considers that there are no material uncertainties about the Club's ability to continue as a going concern. Council's going concern assessment includes the expected impact of COVID-19 to the Club for a period of at least 12 months from the date of signing of these financial statements.

#### Significant Judgements and Estimates

The preparation of these accounts requires Council to make judgements, estimates and assumptions that affect the application of policies and reported amount of assets, liabilities, income and expenses.

Judgement and estimates are continually evaluated and are based on historical experiences and other factors, including expectation of future events that are believed to be reasonable under the circumstances.

#### Fixed assets

Fixed assets are included in the balance sheet at cost or at market value at the date of the gift.

#### Depreciation

Depreciation is charged to write off the cost less estimated residual value of assets using the reducing balance method at the following rates:

- heritable properties land	0%
- buildings	1% of building cost each year
- furniture and fittings	20%
- computers and other equipment	50%
- solar panels	4% of initial cost each year

Heritable property – land – is not depreciated as it is considered to be increasing in value.





## NOTES TO THE FINANCIAL STATEMENTS (CONT)

### For the year to 31 March 2021

#### Investments

Under the Statement of Recommended Practice, investments are shown at market value. Unrealised gains are recognised in the statement of financial activities in the year in which they arise. Purchases are recorded at cost and disposals at their realised value.

#### Investment Income

Income from investments is credited in the year in which it is received.

#### Debtors

Debtor balances are stated at the transaction price less any impairment.

#### Bank and Cash

These comprise cash and balances with banks which are readily convertible into cash.

#### Creditors

Creditor balances are recognised where the Charity has a present obligation resulting from a past event that will probably result in a transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated readily.

#### Stock

Stock is stated at the lower of cost and net realisable value.

#### Income

Grant income is credited in the year to which it relates. Legacies and donations receivable are credited in the statement of financial activities when there is sufficient certainty of their receipt and the value of incoming resources can be measured with sufficient reliability. Legacies receivable without conditions are credited to unrestricted funds; legacies receivable with the condition that they will be invested and the income spent for the benefit of the Club are credited to the Endowment Capital Fund and the income from this fund is credited to unrestricted funds. Sales, membership and other income are recognised as the invoiced value of goods and services provided during the period to which they relate. All income is stated net of value added tax.

#### Expenditure

Expenditure is charged in the period to which it relates. Wherever possible, expenses are attributed directly to the category to which they relate. Where this is not possible expenses are allocated on the basis of time spent by staff on each activity.

#### Operating leases

Lease payments under operating leases are charged as expenses in the periods in which they are incurred.

#### Definition of Funds

Unrestricted funds comprise designated funds which have been set aside by the Council to fund specific future projects in the furtherance of the Club's objectives, and the general reserve. Restricted funds are funds which are subject to specific restrictions imposed by the income provider in relation to how the income can be spent.



## NOTES TO THE FINANCIAL STATEMENTS (CONT)



For the year to 31 March 2021

**2. DONATION & LEGACIES**

	<b>Unrestricted Funds £</b>	<b>Restricted Funds £</b>	<b>2021 Total £</b>	<b>2020 Total £</b>
Membership subscriptions	96,631	-	96,631	92,556
Donations – general	33,467	-	33,467	24,721
Legacies	1,500	-	1,500	8,000
Branches: grants	2,996	-	2,996	-
	<u>134,594</u>	<u>-</u>	<u>134,594</u>	<u>125,277</u>

Income from donations and legacies was £134,594 (2020: £125,277) of which £134,594 (2020: £125,277) was unrestricted and £Nil (2020: £Nil) was restricted.

**3. INCOMING RESOURCES FROM CHARITABLE ACTIVITIES**

	<b>Unrestricted Funds £</b>	<b>Restricted Funds £</b>	<b>2021 Total £</b>	<b>2020 Total £</b>
Sale of goods, except art	12,486	-	12,486	55,290
Commission on art sales	6,683	-	6,683	22,773
Conferences and events	(4,104)	-	(4,104)	40,039
Solar panel Feed-in-tariffs	3,182	-	3,182	3,078
<i>Birds of Scotland</i> (BS3)	-	-	-	33
Grants:				
East Lothian Council - COVID-19	37,000	-	37,000	-
Coronavirus Job Retention Scheme	3,066	-	3,066	-
	<u>58,313</u>	<u>-</u>	<u>58,313</u>	<u>121,213</u>

Income from charitable activities was 58,313 (2020: £121,213) of which £58,313 (2020: £121,213) was unrestricted and £Nil (2020: £Nil) was restricted.

## NOTES TO THE FINANCIAL STATEMENTS (CONT)

For the year to 31 March 2021

### 4. INCOMING FROM OTHER TRADING ACTIVITIES

	Unrestricted Funds £	Restricted Funds £	2021 Total £	2020 Total £
Hire of Lecture room	-	-	-	1,830
	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>

Income from other trading activities was £Nil (2020: £1,830) of which £Nil (2020: £1,830) was unrestricted and £Nil (2020: £Nil) was restricted.

### 5. INVESTMENT INCOME

	Unrestricted Funds £	Restricted Funds £	2020 Total £	2019 Total £
Dividends	13,534	-	13,534	15,601
Interest received	12	-	12	517
Royalties	172	-	172	317
	<u>13,718</u>	<u>          </u>	<u>13,718</u>	<u>16,435</u>

Income from Investments was £13,718 (2020: £16,435) of which £13,718 (2020: £16,421) was unrestricted and £Nil (2020: £14) was restricted



### 6. STAFF NUMBERS AND COSTS

	2021 Total £	2020 Total £
Wages and salaries	97,516	109,845
Social security costs	1,722	4,592
Pension costs	1,543	1,980
	<u>100,781</u>	<u>116,417</u>
Average number of employees	<u>7</u>	<u>8</u>

There were no employees with emoluments above £60,000.

The Honorary Treasurer and members of the editorial team were paid honoraria in lieu of expenses totalling £2,680 (2020: £3,710).

## NOTES TO THE FINANCIAL STATEMENTS (CONT)

For the year to 31 March 2021

**7. EXPENSES**

	Raising Funds £	Charitable Activities £	Trading £	Governance costs £	Total 2021 £	Total 2020 £
- Staff costs and Honoraria	7,242	88,977	7,242	-	103,461	120,127
- Library	-	250	-	-	250	2,119
- Subscriptions & publications	1,449	34,781	-	-	36,231	46,734
- Merchandise	-	-	6,491	-	6,491	26,574
- Material Purchases	-	-	-	-	-	106
- Mailing	765	765	-	-	1,530	4,256
- Conferences	-	(233)	-	-	(233)	39,336
- Branches	-	7,104	-	-	7,104	16,452
- Administration	276	3,386	276	-	3,937	5,485
- Independent examination	-	-	-	1,600	1,600	1,600
- Legal fees	-	-	-	3,426	3,426	997
- Investment manager Fees	4,410	-	-	-	4,410	3,930
- Photocopies	-	2,721	-	-	2,721	4,858
- Council & Committee Expenses	-	-	-	80	80	2,529
- Depreciation	-	10,461	-	-	10,461	12,137
- Loss on disposal	-	4,016	-	-	4,016	-
- Promoting the Club	4,281	-	-	-	4,281	5,226
- Research Grants	-	7,978	-	-	7,978	3,980
<b>Premises</b>						
- Insurance	-	7,727	-	-	7,727	6,016
- Utilities	-	3,299	-	-	3,299	5,797
- Maintenance	-	5,366	-	-	5,366	8,822
- Other	-	-	-	-	-	2,543
- Miscellaneous	-	1,297	-	-	1,297	470
	18,423	177,895	14,009	5,106	215,433	320,094



## NOTES TO THE FINANCIAL STATEMENTS (CONT)

For the year to 31 March 2021

## 8. TANGIBLE ASSETS

	Land £	Building £	Furniture & Fittings £	Computers & Equipment £	Solar Panels £	Total £
<b>Cost</b>						
Balance at 13 March 2020	88,125	872,347	33,024	50,356	22,900	1,066,752
Additions in year	-	-	-	321	-	321
Disposals in year	-	-	(32,438)	(48,087)	-	(80,525)
Balance at 31 March 2021	<u>88,125</u>	<u>872,347</u>	<u>586</u>	<u>2,590</u>	<u>22,900</u>	<u>986,548</u>
<b>Depreciation</b>						
Balance at 31 March 2020	-	130,731	28,861	48,900	8,244	216,736
Changed in the Year	-	8,723	94	728	916	10,461
Depreciation On disposals	-	-	(28,744)	(47,765)	-	(76,509)
Balance at 31 March 2021	<u>-</u>	<u>139,454</u>	<u>211</u>	<u>1,863</u>	<u>9,160</u>	<u>150,688</u>
<b>Net book value</b>						
At 31 March 2021	<u>88,125</u>	<u>732,893</u>	<u>375</u>	<u>727</u>	<u>13,740</u>	<u>835,860</u>
At 31 March 2020	<u>88,125</u>	<u>741,616</u>	<u>4,163</u>	<u>1,456</u>	<u>14,656</u>	<u>850,016</u>



## NOTES TO THE FINANCIAL STATEMENTS (CONT)

**For the year to 31 March 2021**

### 8. TANGIBLE ASSETS (CONT)

#### Library

The Club maintains a library of books and periodicals relating to ornithology. This library has been acquired by purchase and by donation over the lifetime of the Club and is recognised as a significant asset for the study of ornithology in Scotland.

Due to the difficulty in valuing gifts and of ascertaining expenditure in past years, the library is not capitalised in the accounts; it is treated as a heritage asset.

### 9. INVESTMENTS

	<b>2021</b>	<b>2020</b>
	<b>Total</b>	<b>Total</b>
	<b>£</b>	<b>£</b>
Market value at start of financial year	448,737	384,695
Additions at cost	73,445	131,947
Disposal proceeds	(83,937)	(6,664)
Net gains/(loss) on revaluation at financial year end	110,812	(61,241)
	<u>549,057</u>	<u>448,737</u>
Market value at financial year end	<u>549,057</u>	<u>448,737</u>
Historical cost as at financial year end	419,542	420,862

All investments are listed on the UK stock exchange.

All investments are carried at their fair value. Investments are all in traded in quoted public markets, primarily the London Stock Exchange. The basis of fair value for quoted investments is equivalent to the market value, using the bid price. Asset sales and purchases are recognised at the date of trade at cost (that is their transaction value).

The significance of the financial instruments to the ongoing financial sustainability of the Club is considered in the financial review and investment policy and Council's Annual Report.

The main form of financial risk faced by the Club is that of volatility in equity markets and investment markets due to wider economic conditions, the attitude of the investors to investment risk, and changes in sentiment concerning equities and within particular sectors and sub sectors, particularly as the Club is reliant on the dividend yield in part to finance its work.

The Club has managed the investment risks by retaining expert advisors and operating an investment policy that provides a high degree of diversification of holdings within investment asset classes that are quoted on recognised stock exchange. The Club does not make use of derivatives and other similar complex financial instruments.



## NOTES TO THE FINANCIAL STATEMENTS (CONT)

For the year to 31 March 2021

### 10. DEBTORS

	<b>2021</b>	<b>2020</b>
	<b>Total</b>	<b>Total</b>
	<b>£</b>	<b>£</b>
Trade debtors	135	370
Other debtors	22,050	16,891
	<u>22,185</u>	<u>17,261</u>

### 11. CREDITORS: Amounts falling due within one year

	<b>2021</b>	<b>2020</b>
	<b>Total</b>	<b>Total</b>
	<b>£</b>	<b>£</b>
Trade creditors	1,285	2,693
Tax and other social security	1,550	841
Accruals	3,599	2,826
	<u>6,434</u>	<u>6,360</u>



## NOTES TO THE FINANCIAL STATEMENTS (CONT)



For the year to 31 March 2021

## 12. FUNDS

	Balance at 31 March 2020 £	Income £	Expenses £	Loss/gains on investments £	Transfers £	Balance at 31 March 2021 £
<b>Unrestricted funds</b>						
General Fund	508,331	200,549	(196,708)	-	(1,112)	511,060
Endowment Fund (unrestricted)	223,027	-	(2,161)	54,298	-	275,164
Endowment Fund Research Grant	3,600	-	(1,112)	-	1,112	3,600
<i>Birds of Scotland</i> (BS3) Fund	47,227	-	(6,866)	-	-	40,361
Unrestricted Funds Held by branches	52,187	6,076	(6,337)	-	-	51,926
	<u>834,372</u>	<u>206,625</u>	<u>(213,184)</u>	<u>54,298</u>	<u>-</u>	<u>882,111</u>
<b>Restricted funds</b>						
Property Endowment Fund	334,727	-	-	-	-	334,727
Endowment Fund (restricted)	232,130	-	(2,249)	56,514	-	286,395
Restricted Funds held by branches	8,873	-	-	-	-	8,873
	<u>575,730</u>	<u>-</u>	<u>(2,249)</u>	<u>56,514</u>	<u>-</u>	<u>629,995</u>
<b>Total</b>	<u>1,410,102</u>	<u>206,625</u>	<u>(215,433)</u>	<u>110,812</u>	<u>-</u>	<u>1,512,106</u>

**Fund purposes:**
**Unrestricted Funds:**

Endowment Fund which has been established in the past mostly by legacies received, held in investments.

Endowment Fund research grant is a fund put aside by Council each year to provide research and survey grants.

*Birds of Scotland* Fund is a designated fund for spending on publications.

Other unrestricted funds are held by Branches. Total branch funds include restricted funds listed in Note 13.

## NOTES TO THE FINANCIAL STATEMENTS (CONT)

## For the year to 31 March 2021

## 12. FUNDS (CONT)

**Restricted Funds:**

Property Endowment Capital Fund which was established by a donation of property is used to provide and maintain a centre for ornithology in Scotland.

Endowment Fund which has been established previously, mostly by legacies received. A proportion is a capital endowment with conditions allowing only the income to be spent so is listed here in restricted funds, the remaining has been reserved by Council to be spent at their discretion and forms part of the reserves of the Club and list in unrestricted funds

Other restricted funds, received for specific projects, are held by Branches. Total Branch funds include restricted funds listed in Note 13.

	Balance at 31 March 2019 £	Income £	Expenses £	Loss/gains on investments £	Transfers £	Balance at 31 March 2020 £
<b>Unrestricted funds</b>						
General Fund	688,479	253,296	(296,954)	-	(136,489)	508,331
Endowment Fund (unrestricted)	124,879	-	(1,926)	(30,008)	130,082	223,027
<i>Birds of Scotland</i> (BS3) Fund	48,944	33	(1,750)	-	-	47,227
Unrestricted Funds Held by branches	55,428	11,412	(15,230)	-	577	52,187
	<u>917,729</u>	<u>264,741</u>	<u>(318,090)</u>	<u>(30,008)</u>	<u>-</u>	<u>834,372</u>
<b>Restricted funds</b>						
Property Endowment Fund	334,727	-	-	-	-	334,727
Endowment Fund (restricted)	265,367	-	(2,004)	(31,233)	-	232,130
Restricted Funds held by branches	8,859	14	-	-	-	8,873
	<u>608,953</u>	<u>14</u>	<u>(2,004)</u>	<u>(31,233)</u>	<u>-</u>	<u>575,730</u>
<b>Total</b>	<u>1,526,682</u>	<u>264,755</u>	<u>(320,094)</u>	<u>(61,241)</u>	<u>-</u>	<u>1,410,102</u>





## NOTES TO THE FINANCIAL STATEMENTS (CONT)

For the year to 31 March 2021

### 13. FUNDS HELD BY BRANCHES

	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
<b>Income:</b>		
Donations	20	3,229
Sales	2,462	3,484
Bank interest	3	18
Grants	2,996	-
Other	595	4,695
	<hr/>	<hr/>
	6,076	11,426
<b>Expenditure:</b>		
Room hire	(60)	(3,979)
Speakers' expenses	(132)	(1,185)
Equipment purchase	-	(2,052)
Publication costs (net of stock revaluation)	(1,909)	(3,611)
Donations / grants	(4,409)	(1,035)
Other	(512)	(3,368)
	<hr/>	<hr/>
	7,022	(15,230)
Surplus / (Deficit) for the year	<hr/> <hr/>	<hr/> <hr/>
	946	(3,804)



## NOTES TO THE FINANCIAL STATEMENTS (CONT)

### For the year to 31 March 2021

#### 14. ANALYSIS OF NET ASSETS AMONG FUNDS

	<b>Unrestricted Funds £</b>	<b>Restricted Funds £</b>	<b>2021 £</b>
Balances at 31 March 2021 represented by:			
Tangible assets	501,133	334,727	835,860
Investments	269,038	280,019	549,057
Net current assets	111,940	15,249	127,189
	<u>882,111</u>	<u>629,995</u>	<u>1,512,106</u>

	<b>Unrestricted Funds £</b>	<b>Restricted Funds £</b>	<b>2020 £</b>
Balances at 31 March 2020 represented by:			
Tangible assets	515,289	334,727	850,016
Investments	219,881	228,856	448,737
Net current assets	99,202	12,147	111,349
	<u>834,372</u>	<u>575,730</u>	<u>1,410,102</u>

#### 15. RELATED PART TRANSACTIONS

No one individual had control of the Club during the year.

Other than the Honoraria noted in note 6 there have been no further transactions with Council members that require disclosure.



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