

# OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST

England & Wales · Charity number 1064776

## Details

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Other names	THE VICTORIA HISTORY OF OXFORDSHIRE TRUST AND APPEAL
Status	Registered
Legal form	Trust
Registered	1997-10-10
Register	<a href="#">View on the Charity Commission register</a>

## Contact

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Address	48 High Street Wheatley Oxford OX33 1XX
Phone	01865425909
Email	<a href="mailto:michael@mimomul.co.uk">michael@mimomul.co.uk</a>
Website	<a href="https://www.history.ac.uk/research/victoria-county-history/county-histories-progress/oxfordshire">https://www.history.ac.uk/research/victoria-county-history/county-histories-progress/oxfordshire</a>

## Activities

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**Objects:** TO APPLY SUCH MONIES INVESTMENTS AND PROPERTY AS THE TRUSTEES RECEIVE IN THEIR CAPACITY AS TRUSTEES HEREOF FOR THE RESEARCH PREPARATION AND WRITING OF THE VICTORIA COUNTY HISTORY OF OXFORDSHIRE PROVIDED ALWAYS THAT SUCH OBJECT IS EXCLUSIVELY CHARITABLE.THE TRUSTEES SHALL HOLD THE CAPITAL AND INCOME OF THE TRUST FUND UPON TRUST FOR THE OBJECT HEREIN BEFORE DECLARED AND IN DEFAULT OF WHICH UPON TRUST FOR SUCH CHARITABLE OBJECTS FOR THE STUDY OF LOCAL HISTORY AS THE TRUSTEES IN THEIR ABSOLUTE DISCRETION THINK FIT.

**Activities:** The objectives of the Trust are to raise funds for the research, preparation and writing of the remaining volumes of the Victoria County History of Oxfordshire.

## Classification

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- **How:** Sponsors Or Undertakes Research
- **What:** General Charitable Purposes, Education/training, Arts/culture/heritage/science, Environment/conservation/heritage
- **Who:** Other Defined Groups, The General Public/mankind

## Geography

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- **Area of benefit:** OXFORDSHIRE
- Oxfordshire

## Finances

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Period end	Income	Expenditure	Assets	Employees
2025-09-30	£131,900	£128,762	-	-
2024-09-30	£185,029	£154,534	-	-
2023-09-30	£241,182	£153,966	-	-
2022-09-30	£185,183	£159,130	-	-
2021-09-30	£142,125	£158,441	-	-

## Trustees

Name	Role	Appointed
<b>Professor William Hadden Whyte</b>	Chair	2019-03-04
Amanda Ponsonby		2023-03-27
BRIGADIER JOHN NIGEL MOGG DL		2000-03-13
Christopher John Gorrill Parker		2020-06-29
Donald John Ratcliffe		2018-03-05
Dr Elizabeth Gemmill		2024-03-18
Dr Jill Pellew		2005-03-14
Dr Laura Flannigan		2024-03-18
HILARY ROSE HIBBERT-BILES		2018-03-05
JOHN HARWOOD DL		1997-03-17
Michael Heaton		2021-05-24
PROFESSOR ROBERT EVANS		2003-03-17
SARAH JANE TAYLOR		2011-03-15
TOM GRAFTON HASSALL OBE		1997-03-17

**OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST**

England & Wales - Charity number 1064776

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# Accounts

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**OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST**  
**Report and Accounts**  
**1 October 2024 - 30 September 2025**

**Introduction**

1. This report and the accompanying receipts and payments accounts for the year ending 30 September 2025 have been prepared by the Oxfordshire Victoria County History Trust. The report and accounts are intended to help users understand what the Trust was set up to do, the resources available to it, how these resources have been used and what has been achieved as a result of its activities.

**Objectives and Activities**

2. The objectives of the Trust are to raise funds for the historical research, writing, update (if no longer consistent with contemporary standards of historical accuracy) and publication relating to all the parishes in Oxfordshire, so that there is a consistent high quality Victoria County History volume covering every part of the county.
3. The VCH is a national project to publish a detailed history of every parish and town in the country. The research, writing and part of the publication costs of the Oxfordshire volumes have to be raised locally by the Trust.
4. In Oxfordshire there is a research team consisting of a county editor and, usually three with replacement under discussion, assistant editors who are accommodated and employed by Oxfordshire County Council subject to a legal agreement that the Oxfordshire VCH Trust pays for the employment costs of the assistant editor posts and part of the cost of the County Editor's post. Amateur volunteer groups are involved in the research process by the editorial team.
5. The activities of the Trust are to raise funds to meet these employment costs and to contribute to publication costs.
6. The Trustees confirm that they have had regard to the Charity Commission's guidance on public benefit. The Trust provides public benefit in enabling histories of educational and community value to be made available to the public and in enabling the involvement of local groups in the process.

**Achievements and performance**

7. OVCH has published 21 main-series volumes (known as 'The Big Red Books') and 2 paperback volumes. The remaining Volume XXII parishes (Chadlington, Kiddington with Asterleigh, Spelsbury (including Ditchley), and Chilson (with Shorthampton) were all completed in draft, and all except Chilson added to the website, with Chilson to be added very shortly. The volume overview is also in draft, and the whole volume is now being revised ready to be submitted for academic peer review during October 2025. Work has now also begun on rural parishes for Volume 23
8. During 2024-25 the funds raised by the Trust have enabled the Oxfordshire VCH to:
  - Host a reception at Hook Norton Brewery to launch of Volume XXI in October 2024.
  - Research parishes in the west of the county for Volume XXII as above.
  - Several talks to local history groups, and a highly successful series of 'Exploring Local History' weekly sessions led by VCH staff at The Oxfordshire Museum in Woodstock
  - Host a fund-raising reception and talk on our current research at St John's College in December 2024.
  - Circulate one newsletter in print and online.
  - Publicise its activities through the VCH Twitter (now X) and BlueSky accounts, which together have over 900 followers.

## Financial Review

9. Charitable Trust donations were, generally, at a lower level than recent years, with donations of £5,000 or more becoming harder to secure, which resulted in the Trust's income in 2024-5 more-or-less broke even including Gift Aid of some £5,200 which was received and accounted for the previous year. Future gift-aided donations are forecast to remain at this lower level with the claim for 2024-5 being some £5,200, but to reduce in 2026-7. During 2024-5, one of our researchers moved on, resulting in a significant reduction in salary costs but a reduction in our research capability. The replacement and viability of so doing are under discussion by the trustees. Under these circumstances, it is difficult to forecast our future annual out-turn. Support from Oxfordshire County Council, or its possible successor, towards salary costs remains key. Nevertheless, we remain committed to meet future research costs, with plans under discussion to update the much earlier research of the Vale of White Horse when the present research comes to an end by about 2030.

The Trust operated in accordance with the charity's statement on risk assessment and financial controls. The work of the research team remains essential to the high quality of the Oxfordshire VCH publications. Their continuing contribution and commitment to complete the Oxfordshire series is greatly appreciated.

10. All Trustees (including the Chairman and Treasurer) are unpaid, and have given their services voluntarily. No expenses were paid to Trustees during 2023-24. The Trust employs no paid staff.

11. In the year, a trustee donated a total of £15,000 (2024: £10,000), but had advised a reduction to £5,000 next year. There were no other transactions between the trust and the trustees in the year.

### Structure, governance and management.

12. The Trust was established in 1997 by deed.

The trustees met formally twice during the financial year, as well as informally at its public events.

13. The appointment of new trustees is by resolution of the existing trustees. The number of trustees is limited to a maximum of 21 by the trust deed which also provides for an uneven number of trustees, if possible. There are currently fifteen trustees. New trustees are selected for their commitment to the project, to the raising of funds, and for their particular skills and contacts.

14. Due to advancing years, the Treasurer has advised his wish to stand down from his role, but is prepare to stay in this role until a replacement is found, with active steps being taken.

### Reference and administrative details.

15. The Oxfordshire Victoria County History Trust was established by a Trust Deed on 19 September 1997. It is a registered charity, number 1064776. The Trust also operates as the Victoria History of Oxfordshire Trust.

16. The address of the Trust is c/o the Hon. Treasurer, 48 High Street, Wheatley, Oxford, OX 33 1XX.

17. The following were trustees on the date this report was approved:

Prof. William Whyte (Chairman)  
Mr John Harwood (Vice-Chairman)  
Prof. Robert Evans  
Mrs Catherine Fulljames  
Brigadier Nigel Mogg  
Mr Tom Hassall  
Mr Christopher Parker  
Dr Jill Pellew

Mrs Hilary Hibbert-Biles  
Dr Donald Ratcliffe  
Mrs Sarah Taylor  
Dr Michael Heaton (Treasurer)  
Mrs Amanda Ponsonby  
Prof. Elizabeth Gemmill (elected 18.3.2024)  
Dr Laura Flannigan (elected 18.3.2024)

18. The Independent Examiner of the Trust's accounts is: Andrew Rodzynski FCA, Wenn Townsend, 30 St Giles, Oxford OX1 3LE.

The Trust's bankers are Lloyds Bank

## OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST - YEAR ENDING 30 SEPTEMBER 2025

RECEIPTS	Total 2024-25	Total 2023-24
	£	£
Gift Aid Donations	22,060	20,980
Non Gift Aid Donations	90,105	139,595
Event income	0	390
COIF interest	14,490	16,960
Gift Aid repayment to 5 April 2024	5,245	<u>7,104</u>
Total receipts	<u>131,900</u>	<u>185,029</u>
PAYMENTS		
Donations towards research costs	122,992	152,296
Fundraising	3028	1,352
Examination of accounts	870	828
Internet costs	58	58
Publications	1,814	
Total payments	<u>128,762</u>	<u>154,534</u>
Surplus	<u>3,138</u>	<u>30,495</u>
STATEMENT OF BALANCES		
Cash at Lloyds Bank at 1 October 2024	4,655	
Charities Official Investment Fund deposit account at 1 October 2024	349,631	
Surplus of Receipts over Payments, accounting period 2024-2025	<u>3,138</u>	
Balances at 30 September 2025	<u>347,424</u>	
STATEMENT OF ASSETS AND LIABILITIES AT 30 SEPTEMBER 2025		
Cash at Lloyds Bank at 30 September 2025	26,368	
Charities Official Investment Fund deposit account at 30 September 2024	<u>331,056</u>	
NET ASSETS	<u>357,424</u>	

Signed on behalf of the Trustees by William Whyte on 17 March 2026 :



**Independent Examiner's Report to the Trustees of the Oxfordshire Victoria County History Trust**

I report to the charity trustees on my examination of the accounts of the charity for the year ended 30th September 2025 which are set out on page 3.

**Responsibilities and basis of report**

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect that:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act;
- or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



**A. Rodzynski FCA**  
Partner  
Wenn Townsend  
Chartered Accountants  
Oxford  
7 March 2026

**OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST**

England & Wales - Charity number 1064776

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# Accounts

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## **OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST**

### **Report and Accounts**

**1 October 2023 - 30 September 2024**

#### **Introduction**

1. This report and the accompanying receipts and payments accounts for the year ending 30 September 2024 have been prepared by the Oxfordshire Victoria County History Trust. The report and accounts are intended to help users understand what the Trust was set up to do, the resources available to it, how these resources have been used and what has been achieved as a result of its activities.

#### **Objectives and Activities**

2. The objectives of the Trust are to raise funds for the historical research, writing, update (if no longer consistent with contemporary standards of historical accuracy) and publication relating to all the parishes in Oxfordshire, so that there is a consistent high quality Victoria County History volume covering every part of the county.

3. The VCH is a national project to publish a detailed history of every parish and town in the country. The research, writing and part of the publication costs of the Oxfordshire volumes have to be raised locally by the Trust.

4. In Oxfordshire there is a research team consisting of a county editor and three assistant editors who are accommodated and employed by Oxfordshire County Council subject to a legal agreement that the Oxfordshire VCH Trust pays for the employment costs of the assistant editor posts and part of the cost of the County Editor's post. Amateur volunteer groups are involved in the research process by the editorial team.

5. The activities of the Trust are to raise funds to meet these employment costs and to contribute to publication costs.

6. The Trustees confirm that they have had regard to the Charity Commission's guidance on public benefit. The Trust provides public benefit in enabling histories of educational and community value to be made available to the public and in enabling the involvement of local groups in the process.

#### **Achievements and performance**

7. OVCH has published 20 main-series volumes (known as 'The Big Red Books') and 2 paperback volumes. The research for the final three remains to be completed with the volume on Chipping Norton due to be launched on 25 October 2024 at Hook Norton Brewery. Current research is focused on a band of West Oxfordshire parishes from Chastleton on the Gloucestershire border through to Enstone and Kiddington on the east, and this will be published as Volume XXII in a few years' time. The final area of Burford, which will complete the coverage of the pre-1974 county, remains to be started.

8. During 2023-24 the funds raised by the Trust have enabled the Oxfordshire VCH to:

- Host a fund-raising reception and talk on our current research at St John's College in December 2023.
- Research parishes in the west of the county for Volume XXII as above.
- Circulate two newsletters in print and online, and publicise its activities through the VCH Twitter (now X) account, which has over 600 followers.

#### **Obituary**

9. We are very sad to report the deaths of Kate and Liam Tiller. Kate was chair of the Trust from 2003-2021, and Liam the treasurer for the same period.

## Financial Review

10. Charitable Trust donations were, generally, at a lower level than recent years, with donations of £5,000 or more becoming harder to secure. The exception was a much higher donation from our major funder which resulted in the Trust's income in 2023-24 exceeding its expenditure by some £30,500 including Gift Aid of some £7,000 which was received and accounted for the previous year. Future gift-aided donations are also forecast to be lower with the claim for 2023-4 being some £5,200. However, from the start of 2024-5 and with our agreement, one of our researchers will be part-time resulting in an annual saving of some £25,000, but this is not expected to jeopardise the future research detailed in point 7. The result of all this is that forward predictions are that the Trust should, at least, break even on a yearly basis, with the support from Oxfordshire County Council towards salary costs remaining key. We are committed to meet future research costs, with plans under discussion to update the much earlier research of the Vale of White Horse when the present research comes to an end by about 2030. It is unlikely that any reduction of the number of researchers would be required but, in case this was, a notional sum of £50,000 for any prospective redundancy in 2030 is prudent, such that the Trust's funds should be considered to be some £300,000 at the year-end under review.

The Trust operated in accordance with the charity's statement on risk assessment and financial controls. The work of the research team remains essential to the high quality of the Oxfordshire VCH publications. Their continuing contribution and commitment to complete the Oxfordshire series is greatly appreciated.

11. All Trustees (including the Chairman and Treasurer) are unpaid, and have given their services voluntarily. No expenses were paid to Trustees during 2023-24. The Trust employs no paid staff.

12. In the year, a trustee donated a total of £10,000 (2023: £30,000). There were no other transactions between the trust and the trustees in the year.

## Structure, governance and management.

13. The Trust was established in 1997 by deed.

14. The trustees met formally twice during the financial year, as well as informally at its public events.

15. The appointment of new trustees is by resolution of the existing trustees. The number of trustees is limited to a maximum of 21 by the trust deed which also provides for an uneven number of trustees, if possible. There are currently fifteen trustees. New trustees are selected for their commitment to the project, to the raising of funds, and for their particular skills and contacts.

## Reference and administrative details.

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Prof. William Whyte (Chairman)  
Mr John Harwood (Vice-Chairman)  
Prof. Robert Evans  
Mrs Catherine Fulljames  
Brigadier Nigel Mogg  
Mr Tom Hassall  
Mr Christopher Parker  
Dr Jill Pellew

Mrs Hilary Hibbert-Biles  
Dr Donald Ratcliffe  
Mrs Sarah Taylor  
Dr Michael Heaton (Treasurer)  
Mrs Amanda Ponsonby  
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Dr Laura Flannigan (elected 18.3.2024)

19. The Independent Examiner of the Trust's accounts is: Andrew Rodzynski FCA, Wenn Townsend, 30 St Giles, Oxford OX1 3LE.

The Trust's bankers are Lloyds Bank

## OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST - YEAR ENDING 30 SEPTEMBER 2024

## RECEIPTS

	Total 2023-24 £	Total 2022-23
£Gift Aid Donations	20,980	39,505
Non Gift Aid Donations	139,595	184,514
Event income	390	1,721
COIF interest	16,960	10,834
Gift Aid repayment to 5 April 2023 (2021-22 two payments)	<u>7,104</u>	<u>4,608</u>
Total receipts	<u>185,029</u>	<u>241,182</u>

## PAYMENTS

Donations towards research costs	152,296	150,893
Fundraising (see Note 1)	1,352	2,235
Examination of accounts	828	780
Internet costs	58	58
Total payments	<u>154,534</u>	<u>153,966</u>
Surplus	<u>30,495</u>	<u>87,216</u>

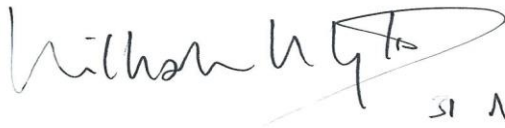
## STATEMENT OF BALANCES

Cash at Lloyds Bank at 1 October 2023	4,120
Charities Official Investment Fund deposit account at 1 October 2023	319,671
Surplus of Receipts over Payments, accounting period 2023-2024	<u>30,495</u>
Balances at 30 September 2024	<u>354,286</u>

## STATEMENT OF ASSETS AND LIABILITIES AT 30 SEPTEMBER 2024

Cash at Lloyds Bank at 30 September 2024	4,655
Charities Official Investment Fund deposit account at 30 September 2024	<u>349,631</u>
NET ASSETS	<u>354,286</u>

Signed on behalf of the Trustees by William Whyte on 31 March 2025



31 March 2025

**Independent Examiner's Report to the Trustees of the Oxfordshire Victoria County History Trust**

I report to the charity trustees on my examination of the accounts of the charity for the year ended 30th September 2024 which are set out on page 3.

**Responsibilities and basis of report**

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect that:

- 1. accounting records were not kept in respect of the charity as required by section 130 of the Act;
- or
- 2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



A. Rodzynski FCA  
Partner  
Wenn Townsend  
Chartered Accountants  
Oxford  
March 2025

24<sup>th</sup> April 2025

**OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST**

England & Wales - Charity number 1064776

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# Accounts

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## **OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST**

### **Report and Accounts**

**1 October 2022 - 30 September 2023**

#### **Introduction**

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3. The VCH is a national project to publish a detailed history of every parish and town in the country. The research, writing and part of the publication costs of the Oxfordshire volumes have to be raised locally by the Trust.
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5. The activities of the Trust are to raise funds to meet these employment costs and to contribute to publication costs.
6. The Trustees confirm that they have had regard to the Charity Commission's guidance on public benefit. The Trust provides public benefit in enabling histories of educational and community value to be made available to the public and in enabling the involvement of local groups in the process.

#### **Achievements and performance**

7. OVCH has published 20 main-series volumes (known as 'The Big Red Books') and 2 paperback volumes. The research for the final three remains to be completed with the volume on Chipping Norton due to be published in 2024; research on the Chadlington area is now also underway, leaving the Burford area still to be started.
8. During 2022-23 the funds raised by the Trust have enabled the Oxfordshire VCH to:
  - Host a fund-raising reception and talk on our current research at County Hall in December 2022.
  - Host a fund-raising reception at Sarsden Rectory in June 2023 to raise funds for Volume 21 (focused on the town of Chipping Norton and surrounding parishes) and Volume 22 (focused on a dozen further west Oxfordshire parishes). By the year end, the text for Volume 21 was complete and had been successfully peer-reviewed, finding it 'impressive', 'well researched', and 'an invaluable reference book'. Final revisions were being implemented, and maps and illustrations completed ready for submission to the publisher, subsequently on schedule.
  - Commence research for Volume 22, the Chadlington area.
  - Circulate two newsletters in print and online, and publicise its activities through the VCH Twitter (now X) account, which has over 600 followers.

## Financial Review

9. Due to increased fund-raising activities and exceptional donations, the Trust's income in 2022-23 exceeded its expenditure by some £87,000, leaving a balance of some £323,800. Gift Aid is accounted in the period received (with £7103 received on 16 October 2023 in respect of donations in the period). There remains a contingent liability of up to £80,000 for redundancy of the researchers at the end of the project, leaving potentially available funds of nearly £244,000. All of the Trust's funds are committed to meet future research costs for the project's completion. A further, but more modest surplus is anticipated for 2023-2024, and assuming similar potential shortfalls for subsequent years the current outlay for four researchers can be continued for several more years. The trustees will keep this matter under constant review, and if necessary (bearing in mind the contingent redundancy liability) will reduce the number of researchers by one at some future date, saving £50,000 annually. The Trust operated in accordance with the charity's statement on risk assessment and financial controls. The work of the research team remains essential to the high quality of the Oxfordshire VCH publications. Their continuing contribution and commitment to complete the Oxfordshire series is greatly appreciated.

10. All Trustees (including the Chairman and Treasurer) are unpaid, and have given their services voluntarily. No expenses were paid to Trustees during 2022-23. The Trust employs no paid staff.

## Structure, governance and management.

11. The Trust was established in 1997 by deed.

12. The trustees met formally twice during the financial year, as well as informally at its public events.

13. The appointment of new trustees is by resolution of the existing trustees. The number of trustees is limited to a maximum of 21 by the trust deed which also provides for an uneven number of trustees, if possible. There are currently thirteen trustees. New trustees are selected for their commitment to the project, to the raising of funds, and for their particular skills and contacts.

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Mrs Catherine Fulljames  
Brigadier Nigel Mogg  
Mr Tom Hassall  
Mrs Hilary Hibbert-Biles

Mr Christopher Parker  
Dr Jill Pellew  
Dr Donald Ratcliffe  
Mrs Sarah Taylor  
Dr Michael Heaton (Treasurer)  
Mrs Amanda Ponsonby

The following trustees resigned during the financial year: Mr John Leighfield and Mrs Lorraine Lindsay-Gale on 24 October 2022, and Major Timothy Hallchurch on 27 March 2023.

17. The Independent Examiner of the Trust's accounts is: Andrew Rodzynski FCA, Wenn Townsend, 30 St Giles, Oxford OX1 3LE.

The Trust's bankers are Lloyds Bank

## OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST - YEAR ENDING 30 SEPTEMBER 2023

RECEIPTS	Total 2022-23	Total 2021-22
	£	£
Gift Aid Donations	39,505	20,429
Non Gift Aid Donations	184,514	157,923
Event income	1,721	0
COIF interest	10,834	400
Gift Aid repayment to 5 April 2023 (2021-22 two payments)	<u>4,608</u>	<u>6,431</u>
Total receipts	<u>241,182</u>	<u>185,183</u>
PAYMENTS		
Donations towards research costs	150,893	155,215
Fundraising (see Note 1)	2,235	1,286
Examination of accounts	780	744
Internet costs	58	97
Publications		1,788
Total payments	<u>153,966</u>	<u>159,130</u>
Surplus	<u>87,216</u>	<u>26,053</u>

Note 1: Fundraising expenditure is made up of: Printing & postage expenditure of £788 (2021: £949) and event expenditure of £1447 (2021: £337).

## STATEMENT OF BALANCES

Cash at Lloyds Bank at 1 October 2022	147,738
Charities Official Investment Fund deposit account at 1 October 2022	88,837
Surplus of Receipts over Payments, accounting period 2022-2023	<u>87,216</u>
Balances at 30 September 2022	<u>323,791</u>

## STATEMENT OF ASSETS AND LIABILITIES AT 30 SEPTEMBER 2023

Cash at Lloyds Bank at 30 September 2023	4,120
Charities Official Investment Fund deposit account at 30 September 2023	<u>319,671</u>
NET ASSETS	<u>323,791</u>

Signed on behalf of the Trustees  
Date

**William Whyte**  
18<sup>th</sup> March 2024

## **Independent Examiner's Report to the Trustees of the Oxfordshire Victoria County History Trust**

I report to the charity trustees on my examination of the accounts of the charity for the year ended 30th September 2023 which are set out on page 3.

### **Responsibilities and basis of report**

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### **Independent examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act;
- or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

### **A. Rodzynski FCA**

Partner

Wenn Townsend

Chartered Accountants

Oxford

18<sup>th</sup> March 2024

**OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST**

England & Wales - Charity number 1064776

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# Accounts

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**OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST**  
**Report and Accounts**  
**1 October 2021 - 30 September 2022**

**Introduction**

1. This report and the accompanying receipts and payments accounts for the year ending 30 September 2022 have been prepared by the Oxfordshire Victoria County History Trust. The report and accounts are intended to help users understand what the Trust was set up to do, the resources available to it, how these resources have been used and what has been achieved as a result of its activities.

**Objectives and Activities**

2. The objectives of the Trust are to raise funds for the research, writing and publication of the remaining Oxfordshire volumes of the Oxfordshire Victoria County History (OVCH).

3. The VCH is a national project to publish a detailed history of every parish and town in the country. The research, writing and part of the publication costs of the Oxfordshire volumes has to be raised locally by the Trust.

4. In Oxfordshire there is a research team consisting of a county editor and three assistant editors who are accommodated and employed by Oxfordshire County Council subject to a legal agreement that the Oxfordshire VCH Trust pay for the employment costs of the assistant editor posts and part of the cost of the County Editor's post. Amateur volunteer groups are involved in the research process by the editorial team.

5. The activities of the Trust are to raise funds to meet these employment costs and to contribute to publication costs.

6. The Trustees confirm that they have had regard to the Charity Commission's guidance on public benefit. The Trust provides public benefit in enabling histories of educational and community value to be made available to the public and in enabling the involvement of local groups in the process.

**Achievements and performance**

7. OVCH has published 20 main-series volumes (known as 'The Big Red Books') and 2 paperback volumes. The research for the final three remains to be completed with the volume on Chipping Norton due to be published in 2024; research on the Chadlington area is now also underway, leaving the Burford area still to be started.

8. During 2021-22 the funds raised by the Trust have enabled the Oxfordshire VCH to:

- Launch Volume 20 (on the south Chilterns area of south Oxfordshire) at a well-attended reception at Shiplake College in March 2022.
- Host a fund-raising lecture by Michael Wood at Merton College at the end of September 2022.
- Host a fund-raising reception and talk on our current research at St. John's College in December 2021.
- Continue research for Volume 21, focused on the town of Chipping Norton and surrounding parishes.
- Commence research for Volume 22, the Chadlington area.
- Make freely available new draft histories of Over Norton and of the town of Chipping Norton on the VCH website.
- Circulate two newsletters in print and online, and publicise its activities through the VCH Twitter account, which has over 500 followers.

## Financial Review

9. Due to an unexpected and exceptional donation, the Trust's income in 2021-22 exceeded its expenditure by £26,053, leaving a balance of £236,575, with Gift Aid of £1,835 still to come in respect of donations in the period. There remains a contingent liability of up to £80,000 for redundancy of the researchers at the end of the project, leaving potentially available funds of £156,000. All of the Trust's funds are committed to meet future research costs for the project's completion. A shortfall of no more than £20,000 is anticipated for 2022-2023, and assuming similar potential shortfalls for subsequent years the current outlay for four researchers can be continued for several more years. The trustees will keep this matter under constant review, and if necessary (bearing in mind the contingent redundancy liability) will reduce the number of researchers by one at some future date, saving £50,000 annually. The Trust operated in accordance with the charity's statement on risk assessment and financial controls. The work of the research team remains essential to the high quality of the Oxfordshire VCH publications. Their continuing contribution and commitment to complete the Oxfordshire series is greatly appreciated.

10. All Trustees (including the Chairman and Treasurer) are unpaid, and have given their services voluntarily. No expenses were paid to Trustees during 2021-22. The Trust employs no paid staff.

## Structure, governance and management.

11. The Trust was established in 1997 by deed.

12. The trustees met formally twice during the financial year, as well as informally at its three public events.

13. The appointment of new trustees is by resolution of the existing trustees. The number of trustees is limited to a maximum of 21 by the trust deed which also provides for an uneven number of trustees, if possible. There are currently 13 trustees. New trustees are selected for their commitment to the project, to the raising of funds, and for their particular skills and contacts.

## Reference and administrative details.

14. The Oxfordshire Victoria County History Trust was established by a Trust Deed on 19 September 1997. It is a registered charity, number 1064776. The Trust also operates as the Victoria History of Oxfordshire Trust.

15. The address of the Trust is c/o the Hon. Treasurer, 48 High Street, Wheatley, Oxford, OX 33 1XX.

16. The following were trustees on the date this report was approved:

Prof. William Whyte (Chairman)  
Mr John Harwood (Vice-Chairman)  
Prof. Robert Evans  
Catherine Fulljames  
Major Timothy Hallchurch  
Brigadier Nigel Mogg  
Mr Tom Hassall

Mrs Hilary Hibbert-Biles  
Mr Christopher Parker  
Dr Jill Pellew  
Dr Donald Ratcliffe  
Mrs Sarah Taylor  
Dr Michael Heaton (Treasurer)

The following trustees resigned during the financial year: Sir Hugo Brunner, Mr Christopher Butterfield. Mr John Leighfield and Cllr Lorraine Lindsay-Gale resigned on 24 October 2022 and since the year-end.

17. The Independent Examiner of the Trust's accounts is: Andrew Rodzynski FCA, Wenn Townsend, 30 St Giles, Oxford OX1 3LE.

18. The Trust's bankers are Lloyds Bank plc, Wallingford Branch, 4 Market Place, Wallingford, Oxfordshire OX10 0EH.

## OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST - YEAR ENDING 30 SEPTEMBER 2022

RECEIPTS	Unrestricted Funds	Total 2021-22	Total 2020-21
	£	£	£
Gift Aid Donations	20,429	20,429	18,925
Non Gift Aid Donations	157,923	157,923	117,747
Bank Interest	0	0	51
COIF interest	400	400	11
Gift Aid tax repayment up to 30 September 2021	3,159	3,159	-
Gift Aid tax repayment up to 5 April 2022	3,272	3,272	2,232
<b>Total receipts</b>	<b><u>185,183</u></b>	<b><u>185,183</u></b>	<b><u>138,966</u></b>
<b>PAYMENTS</b>			
Donations towards research costs	155,215	155,215	157,020
Fundraising (see Note 1)	1,286	1,286	701
Examination of accounts	744	744	720
Internet costs	97	97	-
Publications	1,788	1,788	-
<b>Total payments</b>	<b><u>159,130</u></b>	<b><u>159,130</u></b>	<b><u>158,441</u></b>
Surplus/(Deficit)	<u>26,053</u>	<u>26,053</u>	<u>(19,475)</u>

Note 1: Fundraising expenditure is made up of: Printing & postage expenditure of £949 (2021: £701) and event expenditure of £337 (2021: £nil).

## STATEMENT OF BALANCES

Cash at Lloyds Bank at 1 October 2021	122,085
Charities Official Investment Fund deposit account at 1 October 2021	88,437
Surplus of Receipts over Payments, accounting period 2021-2022	26,053
<b>Balances at 30 September 2022</b>	<b><u>236,575</u></b>

## STATEMENT OF ASSETS AND LIABILITIES AT 30 SEPTEMBER 2022

Cash at Lloyds Bank	147,738
Charities Official Investment Fund deposit account	88,837
<b>NET ASSETS</b>	<b><u>236,575</u></b>

Signed on behalf of the Trustees


  
**William Whyte**

Date

27<sup>th</sup> March 2023

**Independent Examiner's Report to the Trustees of the Oxfordshire Victoria County History Trust**

I report to the charity trustees on my examination of the accounts of the charity for the year ended 30th September 2022 which are set out on page 3.

**Responsibilities and basis of report**

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act;
- or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

**A. Rodzynski**

27<sup>th</sup> March 2023

A. Rodzynski FCA  
Partner  
Wenn Townsend  
Chartered Accountants  
Oxford



**OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST**

England & Wales - Charity number 1064776

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# Accounts

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# Wenn Townsend

Dr M Heaton  
48 High Street  
Wheatley  
Oxford  
OX33 1XX

**Refreshingly  
clear accounting**

SINCE 1876

30 St Giles, Oxford OX1 3LE  
01865 559900  
hello@wenntownsend.co.uk  
wenntownsend.co.uk

Our Ref: GLC/02110

4th April 2022

Dear Michael

**Oxfordshire Victoria County History Trust**

I enclose a signed copy of the accounts for the year ended 30 September 2021.

Best wishes

Yours sincerely

*Graham*

Partners: D J Pluck FCA, A E Haines FCA, G L Cole FCA,  
S J Bates FCA CTA, A K Bahi FCA, L J Palmer FCA CTA,  
R L Herbert FCCA, L J Baker FCA, A C Rodzynski FCA

Registered to carry on audit work in the UK and regulated  
for a range of investment business activities by the Institute  
of Chartered Accountants in England and Wales.

 **ICAEW**  
CHARTERED  
ACCOUNTANTS

## **OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST**

### **Report and Accounts**

**1 October 2020 - 30 September 2021**

#### **Introduction**

1. This report and the accompanying receipts and payments accounts for the year ending 30 September 2021 have been prepared by the Oxfordshire Victoria County History Trust. The report and accounts are intended to help users understand what the Trust was set up to do, the resources available to it, how these resources have been used and what has been achieved as a result of its activities.

#### **Objectives and Activities**

2. The objectives of the Trust are to raise funds for the research, writing and publication of the remaining Oxfordshire volumes of the Oxfordshire Victoria County History (OVCH).
3. The VCH is a national project to publish a detailed history of every parish and town in the country. The research, writing and part of the publication costs of the Oxfordshire volumes has to be raised locally by the Trust.
4. In Oxfordshire there is a research team consisting of a county editor and three assistant editors who are accommodated and employed by Oxfordshire County Council subject to a legal agreement that the Oxfordshire VCH Trust pay for the employment costs of the assistant editor posts and part of the cost of the County Editor's post. Amateur volunteer groups are involved in the research process by the editorial team.
5. The activities of the Trust are to raise funds to meet these employment costs and to contribute to publication costs.
6. The Trustees confirm that they have had regard to the Charity Commission's guidance on public benefit. The Trust provides public benefit in enabling histories of educational and community value to be made available to the public and in enabling the involvement of local groups in the process.

#### **Achievements and performance**

7. OVCH has published 19 main-series volumes (known as 'The Big Red Books') and 2 paperback volumes. The 20<sup>th</sup> volume is being typeset for publication early in 2022. All the hardback volumes except for the recently published Volume 19 are available free of charge on the IHR's British History Online website. Research on Volume 21 is under way. Two more volumes will then complete the Oxfordshire VCH's coverage of the County.
8. During 2020-21 the funds raised by the Trust have enabled the Oxfordshire VCH to:
  - Complete Volume 20 (on the south Chilterns area of south Oxfordshire) and to submit it for publication.
  - Continue research for Volume 21, focused on the town of Chipping Norton and surrounding parishes. Research concentrated on online resources during periods when archives were closed because of Covid restrictions.
  - Make freely available 5 new draft parish histories on the VCH website.
  - Continue public engagement during Covid through occasional Zoom talks, and involvement of local groups in research activity.
9. In 2020-21 the Trust replaced its annual lecture and reception for supporters and potential supporters with a Zoom

lecture because of Covid restrictions. It has also published two newsletters, circulated in print and online, and has publicised its activities through its Twitter account, which has over 450 followers. A proposed fundraising event in Hook Norton in autumn 2020 was cancelled because of Covid restrictions.

#### **Financial Review**

10. The Trust's expenditure in 2020-21 exceeded its income by £16,316 (after allowing for debtor), leaving a balance of £213,681 inclusive of this debtor. This is a much better out-turn than was forecast 12 months ago, due to much higher level of donations than forecast in the last report. But there is a contingent liability of up to £80,000 for redundancy of the researchers at the end of the project leaving potentially available funds of £133,000. All of the Trust's funds are committed to meet future research costs for the project's completion, these supplemented by drawing on reserves earmarked for that purpose. With the annual projected shortfall of funds expected to be around £40,000 (higher due to non-recurring items) for 2021-2022, the current outlay for four researchers can be continued for at least 2021-2022 and maybe longer. But the trustees will keep this matter under review until it is considered prudent, bearing in mind the contingent redundancy liability, to reduce the number of researchers by one, saving £49,000 annually,. A year ago, this action was foreseen as necessary in 2021-2022, so the position has improved. The Trust operated in accordance with the charity's statement on risk assessment and financial controls.

11. All Trustees (including the Chairman and Treasurer) are unpaid, and have given their services voluntarily. No expenses were paid to Trustees during 2020-21. The Trust employs no paid staff.

#### **Structure, governance and management.**

12. The Trust was established in 1997 by deed.

13. The trustees met four times during the financial year, including a special AGM in April to elect a new Chairman and Vice Chairman. All the meetings were held by Zoom because of Covid19 restrictions, by unanimous agreement of the trustees.

14. The appointment of new trustees is by resolution of the existing trustees. The number of trustees is limited to a maximum of 21 by the trust deed which also provides for an uneven number of trustees, if possible. There are currently 17 trustees. New trustees are selected for their commitment to the project, to the raising of funds, and for their particular skills and contacts.

#### **Reference and administrative details.**

15. The Oxfordshire Victoria County History Trust was established by a Trust Deed on 19 September 1997. It is a registered charity, number 1064776. The Trust also operates as the Victoria History of Oxfordshire Trust.

16. The address of the Trust is c/o the Hon. Treasurer, 48 High Street, Wheatley, Oxford, OX 33 1XX.

17. The following were trustees on the date this report was approved:

	Appointed
Prof. William Whyte (Chairman from April 2021)	2019
Brigadier Nigel Mogg (Vice-Chairman from 2004 to 2021)	2000
Mr John Harwood (Vice-Chairman from 2021)	1997
Sir Hugo Brunner	1997
Mr Christopher Butterfield (resigned in Dec 2021 since the year-end)	2006
Prof. Robert Evans	2003
Catherine Fulljames	2009
Major Timothy Hallchurch	2009
Mr Tom Hassall	1997
Dr Michael Heaton (Treasurer) (from 24 May 2021)	2021
Hilary Hibbert-Biles	2018
Mr John Leighfield	2011
Lorraine Lindsay-Gale	2012
Mr Christopher Parker	2020
Dr Jill Pellew	2005
Dr Donald Ratcliffe	2018
Mrs Sarah Taylor	2011

The following trustees resigned in March 2021: Dr Kate Tiller (former Chair), Mr Liam Tiller (former treasurer), Dame Frances Lannon. Brigadier Nigel Mogg resigned as Vice-Chairman but continued as a trustee.

18. The Independent Examiner of the Trust's accounts is: Graham Cole FCA, Wenn Townsend, 30 St Giles, Oxford OX1 3LE.

19. The Trust's bankers are Lloyds Bank plc, Wallingford Branch, 4 Market Place, Wallingford, Oxfordshire OX10 0EH

## OXFORDSHIRE VICTORIA COUNTY HISTORY TRUST - YEAR ENDING 30 SEPTEMBER 2021

## RECEIPTS

	Unrestricted Funds £	Restricted Funds (see Note 2) £	Total 2020-21 £	Total 2019-20 £
Gift Aid Donations	18,725	200	18,925	10,764
Non Gift Aid Donations	117,747		117,747	114,486
Bank Interest	51		51	1,904
COIF interest	11		11	358
Gift Aid tax repayment up to 5 April 2021	2,232		2,232	3,377
Gift Aid tax repayment up to 30 September 2021	3,159		3,159	
Total receipts	<u>141,925</u>	<u>200</u>	<u>142,125</u>	<u>130,889</u>

## PAYMENTS

Donations towards research costs	157,020		157,020	153,067
Fund raising (see Note 1)	701		701	1,183
Examination of accounts	720		720	690
Total payments	<u>158,441</u>		<u>158,441</u>	146,920
Deficit	<u>16,516</u>	<u>-200</u>	<u>16,316</u>	<u>16,031</u>

Note 1: Fundraising expenditure is made up of: Printing & postage £701.

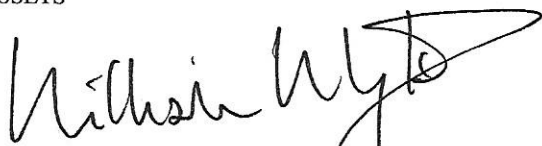
Note 2: Restricted fund receipts were £200 for publication expenses for Volume 21. All the receipts were spent during the year.

## STATEMENT OF BALANCES

Bank Balances at 1 October 2020	229,997
Deficit of Receipts over Payments	(16,316)
Balances at 30 September 2021	<u>213,681</u>

## STATEMENT OF ASSETS AND LIABILITIES AT 30 SEPTEMBER 2021

Debtor – Gift Aid tax repayment for 6 April to 30 September 2021	3,159
Cash at Lloyds Bank	122,085
Charities Official Investment Fund deposit account	88,437
NET ASSETS	<u>213,681</u>



Signed on behalf of the Trustees

Date

William Whyte

(to be signed at the March 2022 AGM)

20. iii .22.

**Independent Examiner's Report to the Trustees of the Oxfordshire Victoria County History Trust**

I report to the charity trustees on my examination of the accounts of the charity for the year ended 30th September 2021 which are set out on pages 4 to 5.

**Responsibilities and basis of report**

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the charity's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity as required by section 130 of the Act;
- or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

G Cole

**G L Cole BA FCA  
Partner  
Wenn Townsend  
Chartered Accountants  
Oxford**

30 March 2022