

MANCHESTER STATISTICAL SOCIETY

England & Wales · Charity number 1069363

Details

Status Registered

Legal form Other

Registered 1998-04-30

Register [View on the Charity Commission register](#)

Contact

Address 19 Bankhall Road
Stockport
SK4 3JR

Phone 01616131750

Website www.manstatsoc.org

Activities

Objects: THE COLLECTION OF FACTS ILLUSTRATIVE OF THE CONDITION OF SOCIETY, AND THE DISCUSSION OF SUBJECTS OF SOCIAL AND POLITICAL ECONOMY, TOTALLY EXCLUDING PARTY POLITICS, AND THE DISSEMINATION AS WIDELY AS PRACTICABLE FOR THE BENEFIT OF THE COMMUNITY OF THE RESULTS OF SUCH COLLECTION AND DISCUSSION

Activities: Inviting speakers to prompt discussion of important topical matters of economic, social and scientific interest, normally with some statistical basis, and publishing papers arising therefrom. Offering grants to develop research or other academic projects, normally from within local universities and focused on topics relevant to Manchester and the North West.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Sponsors Or Undertakes Research
- **What:** Education/training, Arts/culture/heritage/science, Environment/conservation/heritage, Economic/community Development/employment
- **Who:** Other Defined Groups, The General Public/mankind

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£16,079	£18,195	-	-
2024-03-31	£15,955	£29,077	-	-
2023-03-31	£115,744	£9,920	-	-
2022-03-31	£215,537	£6,153	-	-
2021-03-31	£12,804	£10,149	-	-

Trustees

Name	Role	Appointed
Dr Guy Clarke Marshall	Chair	2025-05-13
Nigel Peter Barnes		2025-08-05
Philip Bruce Morgan		2021-05-12
Philip Edward Hulme		2023-05-09

MANCHESTER STATISTICAL SOCIETY

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Accounts

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For

The Year Ended 31 March 2023

Manchester Statistical Society

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Reference and Administrative Details

Trustees

	<i>Role</i>	<i>Date of appointment</i>
Professor Philip Bruce Morgan	Chair	12 May 2021
Dr Frederick Peter Wheeler	Trustee	7 May 2019
The Right Reverend Dr David Stuart Walker	Trustee	9 May 2017
Dr Anthony John Rigby	Trustee	9 June 2015

Officers

President	Professor Philip Morgan
Vice-Presidents	Peter Barnes, Norma Buckley, Tony Johnson, Marcia McCauley
Secretary	Peter Rogers CBE
Treasurer and Membership Secretary	Philip Hulme
Meetings Secretary	Dr Robert Bragg
Webmaster	Dr Guy Marshall
Editor of the Transactions	Dr John Rigby
Campion Awards Committee	Professor David Colman OBE (Chairman), Dr Catherine Casson, Marcia McCauley
Librarian	Neil MacInnes OBE
Elected Council Members	Trish Bristow, Dr Catherine Casson, Dr Ron Catlow, Thomas Hague, Oishee Kundu, Dr Keith Paver, Krystyna Ambroch
Past Presidents serving on Council	Dr Jonathan Aylen, David Buckley, Professor Luke Georghiou, Richard Harrington, Dr John Rigby, Alan Roughley, Dr Stuart Thompson, The Right Reverend Dr David Walker Lord Bishop of Manchester, Dr Fred Wheeler

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2023

Reference and Administrative Details continued)

Address for correspondence

Mr Philip Hulme, Treasurer
19 Bankhall Road
Stockport
SK4 3JR

Charity Registration Number

1069363

Independent Examiner

A J McLaren FCA
Beever and Struthers
One Express
1 George Leigh Street
Manchester
M4 5DL

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2023

Trustees' Report for the year ended 31st March 2023

The trustees present the annual report together with the financial statements of the charity for the year ended 31st March 2023.

Objects and activities

Objectives of the Society

The objects of the Manchester Statistical Society are the collection of facts illustrative of the condition of society, the discussion of subjects of social and political economy (totally excluding party politics) and the dissemination as widely as practicable for the benefit of the community of the results of such collection and discussion

Activities

In relation to those objectives, the main activities for the public benefit are as follows:

1. Meetings
We invite national and international experts to present their analysis of contemporary social and economic issues and to discuss these with our members and the guests to our meetings.
2. Publications
Speakers submit their papers to the Editor of the *Transactions of the Manchester Statistical Society*, which are published and distributed to members and to participating libraries.
3. Awards
We support independent researchers to pursue research aligned with our objects in the form of grants awarded by application to the Society's Champion awards committee.

The Allman prize is awarded each year to an outstanding statistics student on the recommendation of the University of Manchester.

Public benefit

The trustees confirm that they have complied with the requirements of section 4 of the Charities Act 2011 to have due regard to the public benefit guidance published by the Charity Commission for England and Wales.

Achievements and Performance

President's report

I have enjoyed my second, and final, year as President of our Society. Returning to 'normal' after more than two years of Zoom meetings was always going to be a rather unpredictable affair. On the upside, our new venue of the Cross Street Chapel has proved to be a success and attendances have held up well. On average, 31 members attended each meeting (the same as the 189th session) and our numbers were boosted with seven guests typically present (up from a single guest per meeting for the previous year). Less positive is that a number of colleagues appear not to have renewed their membership, perhaps after a period of disengagement during the 'Zoom years'. Hopefully some will return to the fold and, in any case, I request that all current members consider inviting a friend or colleague as a guest to a forthcoming meeting as a precursor (in some cases) to moving towards full membership.

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Month	Speaker and topic	Members	Guests	Total
October	Sir Richard Leese Chair of Greater Manchester Integrated Care Board <i>Recent progress and the future outlook for integrated care in Greater Manchester</i>	29	9	38
November	Mr Paul Dennett Salford city mayor <i>Systematic complexity and challenges amidst Greater Manchester's efforts to deliver affordable homes</i>	33	3	36
January	Mr Stephen Watson Chief Constable, GMP <i>Progress and the way ahead</i>	30	7	37
February	Mr Maqsood Ahmad CEO of the British Muslim Heritage Centre <i>The role of the Muslim community in forging an inclusive city</i>	27	7	34
March	Professor Danny Dorling Professor of Human Geography, University of Oxford <i>Inequality in the UK in terms of family incomes - implications for the cost of living crisis</i>	36	9	45

No meeting was held in December due to industrial action on the railways.

During the course of the year a working party was established to undertake a strategic review of the Society and its governance. This consists of six members: John Rigby, Jonathan Ayles, Thomas Hague, Tony Johnson, Catherine Casson and Philip Morgan. The working party has met three times and, in addition, seven members agreed to be interviewed by our consultant Claire Turner on a one-to-one basis, and a survey has been sent to all members. Overall, progress has been slower than anticipated due in part to difficulties in finding mutually-agreeable dates for the working party, however some there are emerging and the following in an interim update from Ms Turner:

The Strategic Review is progressing well, especially thanks to everyone who is participating so enthusiastically and with a clear view to seeing the Society thrive leading up to its next anniversary. Workshops are taking place with the working party, there are very interesting one-to-one conversations and the survey is revealing wider thoughts.

Some initial notes:

- There is a passion and commitment for the original objects of the Society, and utilising this vision to drive forward the next 10 years.*
- Whilst not part of this Strategic Review, there are a number of governance concerns being raised, principally no knowledge of what type of charity the Society is or where its original legal documents are, a more complex than needed governance structure and the absence of key policy such as a reserves policy.*
- Concerns about succession planning and the relevance of the Society for younger generations.*
- It is essential that the quality of speakers and debate remains.*
- Recognition of the importance of the social interactions in the society and the public wellbeing this brings intellectually, socially and for individuals health.*
- There is a real passion for returning to being a force for change in society through the skills held by members, diversifying membership, exploring digital technologies more and utilising the financial resources that the Society holds to drive forward research or the development of the next generations of researchers*

Something which has been pleasing is the general consensus about the current position of the Society during meetings of the Trustees, at Council discussions and in *ad hoc* chats I have had with members generally. There is great affinity for the MSS and a strong desire for us to evolve and to be as 'fit for purpose' as possible for the future, especially with the 200th anniversary on the horizon. I envisage that the Review recommendations will give us a number of options for moving forwards (including governance and organisational structure) and although I am stepping down from my role as President, I hope that I will be able to play a role in the next stages of the process.

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As part of my report, I would like to note that the Allman prizewinner for 2022 was Mr Nikolas Zacharias, a BSc student of Actuarial Science and Mathematics at the University of Manchester. The prize was endowed in 1951 and is given each year to a statistics student at the University of Manchester.

Financial review

The Society's overall financial position remains healthy, although there are variations within the accounts. Post-covid, the Society was able to resume physical meetings and consequently incurred speakers' expenses and room hire costs for the first time since the 2019/20 session. Unfortunately, this did not lead to any increase in membership numbers and subscription income remained depressed. Three volumes of the *Transactions* were printed during the session and the cost of this, together with meeting expenses, resulted in a deficit of some £4,500 for the year.

The Champion fund did not pay any grants to beneficiaries during the year, and the only significant expenditure was the cost of transcribing the speakers' presentations. The income received increased to over £12,700, and there was a net increase in cash held of almost £10,000. The value of some of the investments fell, however.

Two further tranches of Paul Berry's legacy were received, totalling just over £100k. £300k has now been received and the balance from the estate is expected in the 2023/24 year.

Policy on reserves

The Trust has two types of unrestricted funds: a general fund, and a separately-identifiable fund, the Champion fund, which arose through a legacy of Sir Harry Campion.

The funds held at 31st March 2023 amounted to £305,381 in the general fund and £374,998 in the Champion fund. The general fund has been boosted in the year by a further payment from the estate of Paul Berry, a former president of the Society. The trustees have taken the decision to leave this money within the general fund until the full extent of the legacy can be determined.

The Charity Commission's definition of free reserves excludes the following items:

Permanent endowment funds

Restricted income funds

Designated funds

Fixed assets held for charity use which could only be realised by disposal.

The trustees consider all of the Society's funds to be free reserves.

Manchester Statistical Society

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Structure, governance and management

Nature of governing document

The Society is governed by rules adopted as amended 12 June 1990 and 10 June 1997.

Manchester Statistical Society is a learned society that is one of the oldest statistical societies in the world. The Society was founded in 1833 by a group of Mancunians concerned about the state of society as urbanization and industrialization developed. They carried out the first social survey research with a view to influencing government policy. Our meetings today continue the theme of discussing social and economic issues.

Members are elected by simple majority at an Ordinary or General Meeting, after being proposed and seconded by two existing members, but otherwise require no further qualification other than having an interest in statistical, social and economic issues.

The Society's governing document is its Rules, any amendments to which are approved by the Annual General Meeting of members.

The Annual General Meeting also approves the appointment of the President (who serves for two sessions) Vice-presidents, Treasurer, Secretaries, Editor, and Webmaster. The Council consists of the aforementioned officers as well as up to twelve elected members and those past-presidents who are able and willing to serve.

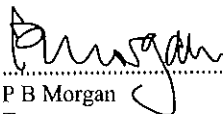
The Trustees are the current president and three previous presidents, who review performance and strategy, while the operational management of the Society is undertaken by the Secretaries and Treasurer in consultation with the Council and President, who chairs both the Council and meetings of trustees.

Applications for the award of grants are reviewed by the Champion Awards Committee and the Treasurer advises the committee on the appropriate value of these awards. This committee is appointed by and reports to Council.

The Editor of the *Transactions* corresponds with those speakers who have agreed to publish their papers and also arranges the publication, including printing and distribution, of the final volumes.

The Society's website is managed by the honorary Webmaster, who is also a member of Council.

The annual report was approved by the trustees of the charity on^{26-JAN-2024} and signed on its behalf by:


.....
P B Morgan
Trustee

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2023

Statement of Trustees' Responsibilities

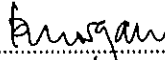
The trustees are responsible for preparing the trustees' report and the financial statements in accordance with the United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) and applicable law and regulations.

The law applicable to charities requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are 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; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the applicable Charities (Accounts and Reports) Regulations, and the provisions of the constitution. The trustees are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the trustees of the charity on 26-JAN-2024 and signed on its behalf by:


.....
P B Morgan
Trustee

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2023

**Report of the Independent Examiners
To the members of the Manchester Statistical Society**

I report on the accounts of the charity for the year ended 31 March 2023 which are set out on pages 5 to 6.

Respective responsibilities of trustees and examiner

The trustees are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 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 the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the next statement.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

(1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with section 130 of the Charities Act 2011; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

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.



A J McLaren FCA

**One Express
1 George Leigh Street
Manchester
M4 5DL**

**Beever and Struthers
Chartered Accountants**

26/1/2024

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2023

Members' General Fund Account for year to 31 March 2023

Income & Expenditure Account	2022/23	2021/22
	<i>£</i>	<i>£</i>
Income		
Subscriptions	1,917	1,817
Sales of papers & Transactions	380	287
Royalty from copyright	140	31
Other income	0	5
Total income	2,437	2,140
Expenditure		
Postage	187	147
Speakers' expenses	262	0
Room hire & guests' dinners	1,089	0
Printing & stationery	5,180	771
Website & IT expenses	180	180
Miscellaneous expenditure	75	245
Total expenditure	6,973	1,343
Surplus/(deficit) for year	(4,534)	797
Other income		
Paul Berry legacy 2 nd & 3 rd tranche	100,083	200,000
Angus McDougall Legacy	500	
Net income for the year	96,047	
Balance Sheet at 31 March	2023	2022
	<i>£</i>	<i>£</i>
Assets		
Current account	305,381	209,332
Amounts owing at year end	0	0
Total	305,381	209,332

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Financed by:

Accumulated fund brought forward	209,332	8,535
Surplus/(deficit) for year	(4,534)	797
Legacies received	<u>100,583</u>	<u>200,000</u>
Accumulated fund carried forward	<u>305,381</u>	<u>209,332</u>

Manchester Statistical Society

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Campion Fund Account for year to 31 March 2023

Income & Expenditure Account	2022/23	2021/22
	<i>£</i>	<i>£</i>
Income		
Income from investments	12,693	10,397
Interest Received	31	0
Total income	12,724	10,397
Expenditure		
Grants to beneficiaries	0	4,370
Bank charges, fund management fee & insurance	0	0
Claire Turner Consultancy	2,250	0
Transcription costs	697	440
Sundries	0	0
Total expenditure	2,947	4,810
Net additions to fund	9,777	5,587
Balance Sheet at 31 March		
	2023	2022
	<i>£</i>	<i>£</i>
Assets		
Long-term investments (2)	321,184	328,641
60-day deposit account (3)	15,332	15,301
Current accounts (4)	38,482	28,736
Amounts owing at year end	0	0
Total Assets	374,998	372,678
Financed by:		
Accumulated fund brought forward	372,678	338,180
Appreciation/(depreciation) of portfolio	(7,457)	28,911
Net addition to fund (interest & dividends less expenditure)	9,777	5,587
Total	374,998	372,678
<i>Investment portfolio</i>	321,184	328,641
<i>Campion current assets</i>	53,814	44,037
	374,998	372,678

MANCHESTER STATISTICAL SOCIETY

England & Wales - Charity number 1069363

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Reference and Administrative Details

Trustees

	<i>Role</i>	<i>Date of appointment</i>
Professor Philip Bruce Morgan	Chair	12 May 2021
Dr Frederick Peter Wheeler	Trustee	7 May 2019
The Right Reverend Dr David Stuart Walker	Trustee	9 May 2017
Dr Anthony John Rigby	Trustee	9 June 2015

Officers

President	Professor Philip Morgan
Vice-Presidents	Peter Barnes, Norma Buckley, Tony Johnson, Marcia McCauley
Secretary	Peter Rogers CBE
Treasurer and Membership Secretary	Philip Hulme
Meetings Secretary	Dr Robert Bragg
Webmaster	Dr Guy Marshall
Editor of the Transactions	Dr John Rigby
Campion Awards Committee	Professor David Colman OBE (Chairman), Dr Catherine Casson, Marcia McCauley
Librarian	Neil MacInnes OBE
Elected Council Members	Trish Bristow, Dr Catherine Casson, Dr Ron Catlow, Thomas Hague, Oishee Kundu, Dr Keith Paver, Krystyna Ambroch
Past Presidents serving on Council	Dr Jonathan Ayles, David Buckley, Professor Luke Georghiou, Richard Harrington, Dr John Rigby, Alan Roughley, Dr Stuart Thompson, The Right Reverend Dr David Walker Lord Bishop of Manchester, Dr Fred Wheeler

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2022

Reference and Administrative Details continued)

Address for correspondence

Mr Philip Hulme, Treasurer
19 Bankhall Road
Stockport
SK4 3JR

Charity Registration Number

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Independent Examiner

A J McLaren FCA
Beever and Struthers
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M4 5DL

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2022

Trustees' Report

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Objectives and activities

Objects of the Society

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Activities

In relation to those objects, the main activities for the public benefit are as follows.

1. Meetings

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Public benefit

The trustees confirm that they have complied with the requirements of section 4 of the Charities Act 2011 to have due regard to the public benefit guidance published by the Charity Commission for England and Wales.

Achievements and Performance

President's Report

It has been a pleasure to act as President of the Society for our 189th Session. To have the opportunity of involvement with an organisation through its *189th annual session* is a privilege which is not lost on me. We have an important and historic role to play in the city.

Of course, we continue to operate in unusual times. The current Session has seen all the ordinary meetings run over Zoom once again. Two years ago when the first meetings were organised in this format, I recall the need for everyone to support each other in mechanics of operating the software and our devising of an etiquette for our meetings – which buttons to press, when cameras and microphones should be turned on and off, how to address questions to our speakers and all the rest. What was so new then is so routine now.

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In terms of plain numbers, the Zoom era has not been a good one for the Society. Essentially, our online meetings allowed us to move into a form of care and maintenance mode – continuing to gather virtually but with no face-to-face opportunities or dinner meetings. A glance at our accounts points to a 40% reduction in subscriptions compared with pre-pandemic levels with membership currently around 60. It could well be that this reduction is temporary and will be reversed (or perhaps more than reversed) when more conventional meetings resume; this is the intent for the 190th Session. An early positive sign is that the anticipated numbers for the AGM are similar to pre-pandemic times. Our attendances for the Session's ordinary meetings are provided in the table below. The online mean attendance of 32 compares to 44 per meeting for the previous (also online) Session.

Meetings and Attendance

<i>Month</i>	<i>Speaker & Topic</i>	<i>Members</i>	<i>Guests</i>	<i>Total</i>
October	Professor Richard Jones FRS Professor of Materials Physics and Innovation Policy, University of Manchester <i>Regional imbalances in innovation investment</i>	27	0	27
November	Reverend Professor Gina Radford Team Vicar, Diocese of Exeter Previously Deputy Chief Medical Advisor for England <i>Physical and spiritual impact of COVID-19</i>	30	2	32
December*	Professor Piers Forster Professor of Climate Physics, University of Leeds <i>Climate change issues after COP26</i>	32	1	33
January	Subrahmaniam Krishnan-Harihara Head of Research, Manchester Chamber of Commerce <i>Manchester business during COVID-19</i>	27	0	27
February	Professor Gregory Clark Distinguished Professor of Economics, University of California, Davis <i>Social mobility in the UK, as revealed by research on surnames</i>	33	3	36
March	Reverend Ian Rutherford Minister, Methodist Central Hall, Manchester <i>Homelessness in Manchester</i>	34	1	35

Note: * The December meeting was postponed to April due to speaker illness.

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During this Session, the Society has been the beneficiary of a significant bequest from Paul Berry. Paul was a member of the Society for 45 years, including 21 years as Secretary, and two years as President (2001-3), followed by a period as Editor of the Transactions; he died in September 2021. Mr. Berry's bequest is more than £200,000 and considerable thought is now required into how this most generous gift can best be deployed in the fulfilment of the aims of the Society. This has already been briefly discussed by the Council and further discussions are planned for later in the year.

With the anticipated return to face-to-face meetings later in the year and our potential access to more significant financial sums, the immediate period ahead promises to be an important one for the Society and I look forward to working with Council members and others to maximise the opportunities ahead.

One more immediate issue for the next session is the need to confirm a new meeting venue. The Alliance Française which hosted us prior to the pandemic is no longer available and alternative venues for the meetings and dinners are presently being explored.

I should report that the 2021 winner of the Allman Prize was Sanja Karilanova. The prize was endowed in 1951 and is given each year to a statistics student at the University of Manchester. The prize is named after A. H. Allman who was the honorary secretary of the Society for 26 years. The most recent winner has recently started to study for a PhD degree at the University of Uppsala in Sweden.

Thanks are due to a long list of colleagues for the successful running of our Society. First, I am grateful to Dr. Robert Bragg (Meetings Secretary) for his continual guidance to me over this past 12 months and in particular his detailed direction ahead of each of the ordinary meetings. Bob also kindly provided the attendance figures for the table above. Mr. Peter Rogers (Secretary) has worked tirelessly to organise the Council and Trustees meetings and has the difficult job of lining up our speakers for 2022-23, a role which is more complex in pandemic conditions. Peter was new to the role 12 months ago and we owe him a debt of gratitude for the work he performs for the Society.

Dr. John Rigby has certainly helped me personally during my time as President and I thank him for that. John has the onerous but pivotal role of preparing and organising our Transactions and is also currently developing an Investment Strategy for the Society.

As a former President, John is a Trustee of the Society and I would like to thank him and the other Trustees – Dr. Fred Wheeler and Bishop David Walker – for their time and effort in overseeing the finances of the Society. In this regard, I am also grateful the expertise and guidance of Mr. Philip Hulme (Treasurer and Membership Secretary) for organising our accounts and investments.

Thanks are also due to Mr. John Davnall for organising our informal summer meetings, Mr. Guy Marshall for looking after our web-site and being the technical organiser of the Zoom meetings, Professor David Colman and the Champion committee for reviewing applications to the Champion Fund, Council members for their continuing service to the Society, and to the respondents in the 189th Session who kindly agreed to play this key role during our ordinary meetings.

As for all areas of our lives, I am hopeful that the 190th Session of the Society will prove to be more 'normal' than the past two years, and that we are able to emerge from the pandemic with a new vigour to pursue the aims of our great organisation.

Manchester Statistical Society

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Financial review

The Covid pandemic continued to have an effect on the Society's financial position during the year. Subscription income fell, in part due to the continuing absence of physical meetings, which deterred some members from renewing their memberships, and it is hoped that some of these will return once normal meetings can be resumed.

Conversely, for a second year, there were no speakers' expenses or room hire costs, which helped to minimise expenditure. The only significant items of expense were the printing of the '*Transactions*', which in recent years has been charged to the Champion Fund, and associated copy-editing work, and £144 for a Zoom licence to enable the Society to hold its meetings online.

Once again, the Society has been able to record a modest surplus, but costs will rise significantly once physical meetings resume and a deficit next year will only be avoided by an increase in membership numbers.

Paul Berry, our former President, left the Society a significant bequest and an interim payment of £200,000 was received in late March. It is anticipated that a further, smaller, payment will be received from Paul's estate later in the year and Council will discuss ways of making the best use of this generous legacy.

Investment income increased by approximately £1,000 compared with the 2020/21, and one grant, to Dr Tomas Diviak, was made during the year. As result, the fund recorded a higher surplus in 2021/22.

The long-term investments continued to recover the value lost in the spring of 2020, but the portfolio is being reviewed to ensure the best returns are being made within the Society's investment strategy.

Policy on reserves

The Trust has two types of unrestricted funds: a general fund and a separately identifiable fund: The Champion Fund, which arose through the legacy of the late Sir Harry Champion.

The funds held at 31 March 2022 amounted to £209,332 in the general fund and £372,678 in the Champion Fund. The general fund has been boosted during the year by another substantial legacy. The trustees have taken the decision to leave this money within the general fund until the full extent of the legacy is determined.

The Charity Commission's definition of free reserves excludes the following items:

- Permanent endowment funds
- Restricted income funds
- Designated funds

Fixed assets held for Charity use which could only be realised by disposal.

The trustees consider all of the Society's funds to be free reserves.

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2022

Structure, governance and management

Nature of governing document

The Society is governed by rules adopted as amended 12 June 1990 and 10 June 1997.

Manchester Statistical Society is a learned society that is one of the oldest statistical societies in the world. The Society was founded in 1833 by a group of Mancunians concerned about the state of society as urbanization and industrialization developed. They carried out the first social survey research with a view to influencing government policy. Our meetings today continue the theme of discussing social and economic issues.

Members are elected by simple majority at an Ordinary or General Meeting, after being proposed and seconded by two existing members, but otherwise require no further qualification other than having an interest in statistical, social and economic issues.

The Society's governing document is its Rules, any amendments to which are approved by the Annual General Meeting of members.

The Annual General Meeting also approves the appointment of the President (who serves for two sessions) Vice-presidents, Treasurer, Secretaries, Editor, and Webmaster. The Council consists of the aforementioned officers as well as up to twelve elected members and those past-presidents who are able and willing to serve.

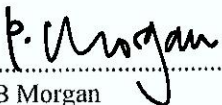
The Trustees are the current president and three previous presidents, who review performance and strategy, while the operational management of the Society is undertaken by the Secretaries and Treasurer in consultation with the Council and President, who chairs both the Council and meetings of trustees.

Applications for the award of grants are reviewed by the Campion Awards Committee and the Treasurer advises the committee on the appropriate value of these awards. This committee is appointed by and reports to Council.

The Editor of the *Transactions* corresponds with those speakers who have agreed to publish their papers and also arranges the publication, including printing and distribution, of the final volumes.

The Society's website is managed by the honorary Webmaster, who is also a member of Council.

The annual report was approved by the trustees of the charity on 9/5/23..... and signed on its behalf by:


.....
P B Morgan
Trustee

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2022

Statement of Trustees' Responsibilities

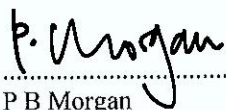
The trustees are responsible for preparing the trustees' report and the financial statements in accordance with the United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) and applicable law and regulations.

The law applicable to charities requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources of the charity for that period. In preparing these financial statements, the trustees are 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; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the applicable Charities (Accounts and Reports) Regulations, and the provisions of the constitution. The trustees are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the trustees of the charity on9/5/23..... and signed on its behalf by:



.....
P B Morgan
Trustee

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2022

Report of the Independent Examiners To the members of the Manchester Statistical Society

I report on the accounts of the charity for the year ended 31 March 2022 which are set out on pages 5 to 6.

Respective responsibilities of trustees and examiner

The trustees are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 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 the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the next statement.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
- to keep accounting records in accordance with section 130 of the Charities Act 2011; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act
- 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.



A J McLaren FCA

One Express
1 George Leigh Street
Manchester
M4 5DL

Beever and Struthers
Chartered Accountants

9 May 2023

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2022

Members' General Fund Account for year to 31 March 2022

Income & Expenditure Account	2021/22	2020/21
	£	£
Income		
Subscriptions	1,817	2,647
Sales of papers & Transactions	287	405
Royalty from copyright	31	0
Other income	5	5
Total income	2,140	3,057
Expenditure		
Postage	147	189
Speakers' expenses	0	0
Room hire & guests' dinners	0	0
Printing & stationery	771	0
Website & IT expenses	180	151
Miscellaneous expenditure	245	170
Total expenditure	1,343	510
Surplus/(deficit) for year	797	2,547
Other income		
Paul Berry legacy 1st tranche	200,000	0
Balance Sheet at 31 March	2022	2021
	£	£
Assets		
Current account (1)	209,332	8,535
Amounts owing at year end	0	0
Total	209,332	8,535
Financed by:		
Accumulated fund brought forward	8,535	5,988
Surplus/(deficit) for year	797	2,547
Paul Berry legacy	200,000	0
Accumulated fund carried forward	209,332	8,535

Manchester Statistical Society

Financial Statements For The Year Ended 31 March 2022

Campion Fund Account for year to 31 March 2022

Income & Expenditure Account	2021/22	2020/21
	£	£
Income		
Interest and dividends	10,397	9,365
Return of grant	0	382
Total income	10,397	9,747
Expenditure		
Grants to beneficiaries	4,370	8,986
Bank charges, fund management fee & insurance	0	0
Printing of 'Transactions' & calendar cards	0	653
Transcription costs	440	0
Sundries	0	0
Total expenditure	4,810	9,639
Net additions to fund	5,587	109
Balance Sheet at 31 March		
	2022	2021
	£	£
Assets		
Long-term investments (2)	328,641	299,730
60-day deposit account (3)	15,301	15,299
Current accounts (4)	28,736	23,151
Amounts owing at year end	0	0
Total Assets	372,678	338,180
Financed by:		
Accumulated fund brought forward	338,180	333,546
Appreciation/(depreciation) of portfolio	28,911	4,525
Net addition to fund (interest & dividends less expenditure)	5,587	109
Total	372,678	338,180
<i>Investment portfolio</i>	328,641	299,730
<i>Campion current assets</i>	44,037	38,450
	372,678	338,180