



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From 01 January 2023 Period start date  
To 31 December 2023 Period end date

**Charity name: BrANCH**

**Charity registration number: 1089066**

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<b>To further the scholarly study of the history of the United States of America between 1789 and 1917; to advance higher education in the subject; to organise seminars, colloquia, and conferences; to publish scholarly materials and writings; to encourage and assist the education, employment and academic research of postgraduate students and junior academic staff (up to ECR)</b>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<b>BrANCH organises an annual conference and has editorial responsibility for, but no legal ownership of, the academic journal <i>American Nineteenth Century History</i> (published by Taylor &amp; Francis). We also offer small grants to UK-based postgraduate students to help fund research and offer an annual prize for the best dissertation written by a UK-based undergraduate or Masters student in the field of nineteenth-century US history. Finally, in collaboration with the Royal Historical Society, BrANCH offers an annual prize to the best dissertation written by a UK-based BAME undergraduate student on any topic relating to nineteenth-century US history</b>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<b>All of the trustees have had regard to the guidance on public benefit issued by the Charity Commission, and this guidance has been considered in undertaking all BrANCH activity this year, particularly the making of grants to help fund the research of UK-based postgraduates, and the award of dissertation prizes to undergraduate and masters students.</b>

**Additional information (optional)**

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<b>BrANCH maintains the Peter Parish Memorial Fund, and has two rounds of competition per annum, with a maximum grant of £1,000 to UK-based individuals, to facilitate the carrying out of primary (archival) research, usually in the United States. A sub-committee of the BrANCH committee look at these applications</b>
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	
Other		

**Achievements and Performance**

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<ol style="list-style-type: none"> <li><b>1. Organised annual conference (which included bursaries to subsidise delegate fees for postgraduate and early career attendees)</b></li> <li><b>2. Editorial responsibility for academic journal</b></li> <li><b>3. Made grants to UK-based postgraduates to fund research</b></li> <li><b>4. Awarded annual dissertation prizes (Parish Prize and Tubman Prize)</b></li> <li><b>5. Created a digital archive holding materials relating to the history of BrANCH, designed to promote understanding of and research on the organisation</b></li> </ol> <p><b>Further detail on the expenditure associated with 1, 3, and 4 can be found in the Accounts document</b></p>

**Additional information (optional)**

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<p>The charity is entirely dependent on membership subscriptions and donations. The latter is particularly important for funding the Peter Parish Memorial Fund, from which we make our annual grants to fund research by UK-based postgraduates and ECRs. BrANCH does not aim to make a surplus on its annual conference. However, when this occurs it transfers this surplus into the Peter Parish Memorial Fund so that it goes directly into underwriting its charitable activities.</p> <p>In 2023 BrANCH saw its membership numbers grow as well as an increase in donations to the Parish Memorial Fund. This coupled with a surplus on the conference means that all three of its bank accounts had a healthy balance. This allowed the committee to</p> <ol style="list-style-type: none"> <li>1. Confirm an increase in the maximum amount award in the Parish Travel Awards from £750 to £1,000</li> <li>2. The transfer of £10,000 from the Main/Conference accounts into the Parish Fund to underwrite this increased grant amount for the next few years (details of this post-account event can be found in the auditor's report)</li> </ol>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<p>The charity trustees follow the advice of our auditor to maintain a balance of approximately £16,000– 18,000 in our accounts to cover fluctuations in receipts and payments, and the risk of reduced receipts at future conferences (which are our main item of expenditure). This represents an increase in the amount the charity has held in reserve in the past (approx. £10,000) caused by inflation in recent years</p>
Amount of reserves held	Para 1.22	<b>27,597</b>
Reasons for holding zero reserves	Para 1.22	<b>N/A</b>
Details of fund materially in deficit	Para 1.24	<b>N/A</b>
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<b>N/A</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	<b>BrANCH is principally funded by its membership subscriptions. Additional sources of funding come from individual donations to the Parish Fund. Although BrANCH does not run its conference to make a profit, and surplus which does appear from the event is diverted back into the Parish Fund or is used to subsidise the attendance of delegates at future conferences</b>
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document ( <a href="#">trust deed</a> , <a href="#">royal charter</a> )	Para 1.25	<b>Constitution</b>
How is the charity constituted? (e.g. <a href="#">unincorporated association</a> , <a href="#">CIO</a> )	Para 1.25	<b>Association</b>
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	<b>Elected by members</b>

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

## Reference and Administrative details

Charity name	Association of British American Nineteenth Century Historians
Other name the charity uses	BrANCH
Registered charity number	1089066
Charity's principal address	Alys Beverton Flat 2 Forest Croft Taymount Rise, Forest Hill London SE23 3UN

### **Names of the charity trustees who manage the charity**

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Professor Emily West	Chair		Members
2	Dr Elizabeth Barnes	Secretary		Members
3	Dr Alys Dyson Beverton	Treasurer		Members
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	N/A
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	N/A
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

#### Name of chief executive or names of senior staff members (Optional information)

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## Exemptions from disclosure

Reason for non-disclosure of key personnel details

N/A
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## Other optional information

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## Declarations

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

Signed on behalf of the charity's trustees

Signature(s)

	
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Full name(s)

Alys Dyson Beverton

Position (eg Secretary,  
Chair, etc)

Treasurer, trustees

Date

27/10/24

**BrANCH Accounts**  
**Charity No; 1089066**

**Accounts for the year ending 31 December 2023**

**BrANCH Accounts**

**Revenue Account for the year ending 31 December 2023**

	2023		2022	
<b>Income</b>				
Subscriptions				
UK (Full)	2800.00		2395.00	
UK (Student)	175.00		190.00	
Overseas (Full)				
	<u>2,975.00</u>		<u>2,585.00</u>	
Conference Surplus/(Deficit)	3,733.16		(729.80)	
Journal Subscriptions	1,195.00		1,350.00	
Interest	159.62		41.57	
Donations	4,890.00		3,370.16	
Sundry	100.00		500.00	
Total receipts	<u>13,052.78</u>	13,052.78	<u>7,116.93</u>	7,116.93
<b>Expenditure</b>				
Fees	(196.75)		(24.27)	
Committee expenses				
Members' Journal Subscriptions	(1,130.00)		(1,285.00)	
Bank charges	(150.22)		(168.61)	
Archive Project expenses	(4,390.00)			
Sundry expenses	(100.00)		(260.00)	
Total payments	<u>(5,966.97)</u>	(5,966.97)	<u>(1,737.88)</u>	(1,737.88)
Surplus/(Deficit) for the year		<u>7,085.81</u>		<u>5,379.05</u>

Treasurer: Alys Beverton



Independent Examiner: Kevan Rowe B.A., F.C.A.

BrANCH Accounts

Balance Sheet as at 31 December 2023

	2023	2022
<b>Assets</b>		
Bank accounts	31,488.62	26,510.96
Branch account (Peter Parish Fund)	7,731.91	7,894.26
Debtors	<u>39,220.53</u>	<u>34,405.22</u>
Creditors	(1,623.36)	(682.16)
	<u><u>37,597.17</u></u>	<u><u>33,723.06</u></u>
 <b>Fund</b>		
Opening balance at 1 January 2023 {Branch}	25,828.80	23,679.45
Opening balance at 1 January 2023{Peter Parish Fund}	7,894.26	5,983.36
Add Surplus/(Deficit) for the year (Branch)	7,085.81	5,379.05
Add Surplus/(Deficit) for the year (Peter Parish Fund)	2,887.65	3,919.13
<b>Use of funds</b>		
Postgraduate bursaries (Branch)		
Postgraduate research grants (Peter Parish Fund)	(3,050.00)	(2,008.23)
Grant to Peter Parish fund	(2,149.35)	(2,329.70)
Dissertation prize	(400.00)	(400.00)
Harriet Tubman prize	(500.00)	(500.00)
Closing balance	<u><u>37,597.17</u></u>	<u><u>33,723.06</u></u>

## BrANCH Accounts

### Note to the accounts

#### 1. Conference Account

	2023
<b>Income</b>	
Conference fees & accommodation	31037.34
Postgraduate Bursaries	2,275.00
Other conference income	7,853.92
	<hr/>
	41,166.26
<b>Expenses</b>	
Conference Account refund	0.00
Expenses	(37,218.13)
Conference Speakers expenses	0.00
Bank charges	(6.00)
Other expenses	(209.00)
	<hr/>
	(37,433.13)
Surplus/(Deficit)	<hr/>
	<u>3,733.13</u>

#### 2. Peter Parish Fund

Opening Balance at 01 January 2018	7,894.26	5,983.36
<b>Income</b>		
Interest	138.30	21.66
Donations: Public	600.00	1,567.77
Branch	2,149.35	2,329.70
	<hr/>	<hr/>
	2,887.65	3,919.13
Grants	(3,050.00)	(2,000.00)
Bank fees		(8.23)
	<hr/>	<hr/>
	(3,050.00)	(2,008.23)
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	<u>7,731.91</u>	<u>7,894.26</u>

#### 3. Post Balance Sheet Event

The trustees of the BrANCH charity at a meeting on 4th October 2024 decided to donate to The Peter Parish fund £10,000.00. This is to enable The Peter Parish fund to increase the value of its awards to take account of increases in accommodation and travel expenses.

## Independent Examiner's Statement

In connection with my examination, no matters 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 Charities Act 2011 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



**Independent Examiner: Kevan Rowe B.A., F.C.A.**

25 Wanstead Close  
Ringwood  
Hampshire  
BH24 1SJ

31 October 2024

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**Charity No; 1089066**

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