

SOCIAL HISTORY CURATORS' GROUP

England & Wales · Charity number 1157994

Details

Other names SHCG

Status Registered

Legal form CIO

Registered 2014-07-24

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

Contact

Address Social History Curators Group
c/o St. Fagans National Museum
St. Fagans
Cardiff
CF5 6XB

Phone 07701031416

Email chairshcg@gmail.com

Website <http://shcg.org.uk>

Activities

Objects: TO ADVANCE THE EDUCATION OF THE PUBLIC IN HERITAGE, SCIENCE AND THE ARTS ADVANCING STANDARDS OF SOCIAL HISTORY CURATORSHIP BY ENCOURAGING BETTER CARE, MANAGEMENT, RESEARCH AND DEVELOPMENT OF COLLECTIONS AND DELIVERY OF IMPROVED USE, ACCESS AND INTERPRETATION OF MUSEUM AND RELATED COLLECTIONS THROUGH PUBLIC-FACING OUTPUTS SUCH AS EVENTS, EXHIBITION, PARTICIPATIVE PROJECTS FOR THE BENEFIT OF THE PUBLIC.

Activities: The Social History Curators Group (SHCG) exists to advance the education of the public in heritage, science and the arts by advancing standards of social history curatorship. We provide information, support and training to enable those responsible for caring for social history collections to use these collections for the public benefit and work to promote the importance of these collections.

Classification

- **How:** Makes Grants To Individuals, Provides Services, Provides Advocacy/advice/information
- **What:** Arts/culture/heritage/science
- **Who:** Other Defined Groups, The General Public/mankind

Geography

- Northern Ireland
- Scotland

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£8,956	£7,794	-	-
2024-03-31	£10,026	£9,748	-	-
2023-03-31	£13,897	£11,487	-	-
2022-03-31	£7,176	£5,772	-	-
2021-03-31	£11,047	£6,063	-	-

Trustees

Name	Role	Appointed
Samantha Jane Daisley	Chair	2022-07-08
Ailsa Stephanie Hendry		2025-07-09
Alexandra Longrigg		2025-07-09
Amy Elizabeth Foulds		2021-06-24
Daniel Stoker		2025-07-09
Frances Elizabeth Stovold		2025-07-09
Louise McAward-White		2023-07-31
Muriel Bryans		2025-07-09
Rebecca Davies		2025-07-09
Samuel Jack Carter		2025-07-09

SOCIAL HISTORY CURATORS' GROUP

England & Wales - Charity number 1157994

Accounts



Trustees' Annual Report for the period

From **01/04/2024** To **31/03/2025**

Charity name: Social History Curators Group

Charity registration number: 1157994

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance the education of the public in heritage, science and the arts advancing standards of social history curatorship by encouraging better care, management, research and development of collections and delivery of improved use, access and interpretation of museum and related collections through public facing outputs such as events, exhibitions, participative projects for the benefit of the public
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	<p>SHCG Committee meetings were held regularly across the year online to facilitate as broad access as possible, with one in person meeting held at Stevenage Museum. An Extraordinary Meeting was held in November 2024 to discuss forward planning ahead of the changeover of a number of trustees at the 2025 AGM.</p> <p>SHCG Chair advocated for a successful reconsideration of the closure of Abbey House Museum to the Leader of Leeds Council, through sending a direct letter, completing consultation forms and signing a petition.</p> <p>SHCG is represented on the Subject Specialist Networks Consortium by the Chair, although no meetings were held this year. The network had remained active via email, although consultation has taken place on how best to continue the network with new leadership to continue to strengthen relationships and build support between SSNs in sharing resources, best practice and co-hosting training and events. SHCG will continue to be represented in this forum and takes an active interest in its future.</p> <p>SHCG News was published in April and November 2024 with an increased number of contributors and the introduction of interviews and discussions with sector professionals alongside reviews and project</p>

		<p>spotlights.</p> <p>Journal vol 48 was published in November 2024, focused on Emotion in Museums in line with the Conference theme. The selection of articles in this issue allowed for emerging professionals and more diverse voices to be featured, with a slightly less academic style.</p> <p>The free Hardship Membership, begun during Covid, continues to be offered to support those who may otherwise be unable to join SHCG due to the rising cost of living and increasing issues with redundancy in the sector.</p> <p>A bi-monthly 'Legacies of Colonialism' online meetup continued for the first half of the year and was run to provide a space for both members and non-members to discuss and support each other with problems, projects or anything else related to colonial histories and other potentially challenging topics in their work. As wider sector support in this area has increased, it was felt that this space was no longer needed.</p> <p>A seminar focused on Intangible Cultural Heritage was held online on 27th November 2024, as a collaboration with another Subject Specialist Network. This brought in £106 in ticket sales and received broadly positive feedback.</p> <p>The 2024 Conference was held online across two days in June 2024 on the theme of Emotion in Museums, attracting between 30 and 52 delegates across the sessions, including bursary places to allow early career members to attend. A series of complementary in person visits were also organised at Leeds City Museum and the Brunel Museum, although with limited takeup. Feedback was wide-ranging, with lessons learned taken on board for the 2025 Conference. A trial of organisational tickets for larger institutions and institutional members was successful, and increased participation in these museums.</p> <p>The firstBASE sub-Committee continued to meet to discuss new ways of promoting skills and resources for social history professionals.</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	SHCG has carried out its purposes as a charity for the public benefit and, in doing so, can confirm we have had regard to the guidance issued by the Charity Commission on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
		n/a

Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	n/a
Contribution made by volunteers	Para 1.38	n/a
Other		n/a

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	<p>Membership numbers were recorded for 2024-25 by the Membership Secretary. As of March 2025, SHCG had the following:</p> <ul style="list-style-type: none"> 58 individual print members (equal to 2023/24) • 108 individual digital members (reduction of 1 on 2023/24) • 90 institutional members (reduction of 2 on 2023/24) 8 Hardship Memberships (increase of 1 on 2023/24) 15 Student Memberships <p>As of March 2025, SHCG had the following:</p> <ul style="list-style-type: none"> Twitter followers: 3,604 ↓ 15% (account no longer active) LinkedIn group followers: 355 ↑ 43% Facebook page followers: 1298 ↓ 0.2% BlueSky followers: (new account) 1,162 Instagram followers: (new account) 360

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	n/a
Performance of fundraising activities against objectives set	Para 1.41	n/a

Investment performance against objectives	Para 1.41	n/a
Other		n/a

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	As of 31st March 2025, SHCG has healthy finances, as outlined in the attached accounts, and does not have a deficit.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The reserves account provides some stability should there be a significant drop in membership income. SHCG may use some of these funds for longer term project activity such as overhauling the website.
Amount of reserves held	Para 1.22	£5000
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	n/a

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	n/a
Investment policy and objectives including any social investment policy adopted	Para 1.46	n/a
A description of the principal risks facing the charity	Para 1.46	n/a
Other		n/a

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution of a Charitable Incorporated Organisation with voting members other than the charity's trustees.
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	Potential trustees must be members of SHCG and their nomination must be proposed by another member. Nominations are voted on digitally by members and confirmed by a quorum at AGM – those garnering the majority of votes are elected. Trustees are elected for a term of 2 years not serving more than 3 consecutive terms. Trustees in named roles – Chair, Secretary, Treasurer – are elected for 3 years equal to 1 term. All trustees work on a voluntary basis and usually undertake a particular role.

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	All trustees are issued with a copy of the constitution, a role description and handover notes from the retiring trustee who previously held that position.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	SHCG is a Subject Specialist Network (SSN), one of many professional networks operating within the museums and heritage sector in the UK. Representatives from each SSN have formed the SSN Consortium which works collaboratively to support individuals and organisations to care for and use their collections for public benefit.
Relationship with any related parties	Para 1.51	n/a
Other		n/a

Reference and Administrative details

Charity name	Social History Curators Group
Other name the charity uses	SHCG
Registered charity number	1157994

Charity's principal address	c/o St Fagans National Museum of History, St Fagans, Cardiff, CF5 6XB

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	Amy Elizabeth Foulds	Chair		SHCG Membership
2	Samantha Jane Daisley	Treasurer		SHCG Membership
3	Charlotte May Barron			SHCG Membership
4	Edward Matthew Smith			SHCG Membership
5	Tracey Louise Hebron			SHCG Membership
6	Louise McAward-White			SHCG Membership
7	Jill Birrell	Secretary		SHCG Membership
8	Henry Joseph Roberts			SHCG Membership
9	Imogen Amy Clarke			SHCG Membership
10	Ivet Ivanova Benova			SHCG Membership
11				
13				
14				
15				
16				
17				
18				
19				
20				

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

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

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)

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

--


Other optional information

--

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Amy Elizabeth Foulds	
Position (eg Secretary, Chair, etc)	Chair	
Date	17/12/2025	

SOCIAL HISTORY CURATORS GROUP

SHCG

Receipts and Payments Accounts

**Year Ended
31 March 2025**

**SOCIAL HISTORY CURATORS GROUP
SHCG
Receipts and Payments Accounts
For the Year Ended 31 March 2025**

	2025	2024
Receipts		
Membership Subs	7,320.19	7,307.40
Conference 2023	-	2,409.14
Conference 2024	1,347.25	-
Seminars 2023	-	129.10
Seminars 2024	288.64	144.16
Publications Licensing	-	36.62
	<u>8,956.08</u>	<u>10,026.42</u>
Expenses		
Committee Travel	239.20	151.89
Conference Expenses 2023	-	3,489.19
Conference Expenses 2024	1,052.28	-
Seminar Expenses	257.99	-
First Base	276.23	521.05
Postage & Stationery	1,231.21	435.75
Newsletter Expenses	1,923.00	2,596.00
Journal Expenses	1,131.60	1,075.90
Accountancy	324.00	324.00
Insurance	365.76	356.48
Sundries & Misc	992.75	798.27
	<u>7,794.02</u>	<u>9,748.53</u>
Net Movement in Funds	<u>1,162.06</u>	<u>277.89</u>
Total Funds Brought Forward	28,565.66	28,287.77
Total Funds Carried Forward	<u>29,727.72</u>	<u>28,565.66</u>

**SOCIAL HISTORY CURATORS GROUP
SHCG
Statement of Balances
For the Year Ended 31 March 2025**

	Unrestricted Funds 2025	Restricted Funds 2025	Total 2025	Total 2024
Current Assets				
Cash in hand	-	-	-	-
CO-OP Current Account	24,727.72	-	24,727.72	23,565.66
CO-OP Reserve Account	5,000.00	-	5,000.00	5,000.00
Net Assets as at 31 March 2025	<u>29,727.72</u>	<u>-</u>	<u>29,727.72</u>	<u>28,565.66</u>
Reserves				
General Funds available as at 1 April 2024	28,565.66	-	28,565.66	28,287.77
Surplus / Deficit for the year As per P&R Account	1,162.06	-	1,162.06	277.89
Total Funds as at 31 March 2025	<u>29,727.72</u>	<u>-</u>	<u>29,727.72</u>	<u>28,565.66</u>

Signed 

Print Name SAMANTHA DAISLEY

Designation SHCG TREASURER

Date 30/07/2025

Independent examiner's report on the accounts

9th July 2025

To the Members of the Social History Curators Group on the accounts for the year ended 31 March 2025.

This report is made solely to the society's members, as a body. Our examination work has been undertaken so that we might state to the society's members those matters we are required to state to them in an examiners' report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the society and the society's members as a body, for our work, for this report, or for the opinions we have formed.

Respective responsibilities of Society Board Members and examiner

The Society Board Members consider that an audit is not required for this year as an appropriate resolution was approved by members at the last AGM and that an independent examination is therefore appropriate.

It is our responsibility to:

- examine the accounts
- follow the procedures laid down in the General Directions given by Social History Curators Group; and
- state whether particular matters have come to our attention.

Basis of independent examiner's statement

Our examination was carried out in accordance with General Directions given by Social History Curators Group. 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 seeks explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, we do not express an audit opinion on the accounts.

Independent examiner's statement

In the course of our examination, no matter has come to our attention;

1. Which gives us reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records, and
 - to prepare accounts which accord with the accounting records and comply with Generally accepted accounting requirements have not been met, or
2. To which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Z group

Z group
Suite LU.231, The Light Bulb
1 Filament Walk
Wandsworth, London
SW18 4GQ

SOCIAL HISTORY CURATORS' GROUP

England & Wales - Charity number 1157994

Accounts



Trustees' Annual Report for the period

From 01/04/2023 To 31/03/2024

Charity name: Social History Curators Group

Charity registration number: 1157994

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance the education of the public in heritage, science and the arts advancing standards of social history curatorship by encouraging better care, management, research and development of collections and delivery of improved use, access and interpretation of museum and related collections through public facing outputs such as events, exhibitions, participative projects for the benefit of the public
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	<p>SHCG Committee meetings were held regularly across the year, with one in person meeting held at the Durham Oriental Museum.</p> <p>SHCG Chair advocated for a review of the proposed funding cuts facing museums in Wales and was a co-signatory of a petition presented to the Senedd.</p> <p>SHCG is represented on the Subject Specialist Networks Consortium by the Chair, although no meetings were held this year. The network remains active via email, and an introductory event for interested parties was held online by Museum Development West Midlands on 7th September 2023, which the SHCG Chair presented at. This continues to strengthen relationships and build support between SSNs in sharing resources, best practice and co-hosting training and events. SHCG will continue to be represented in this forum.</p> <p>SHCG News was published in April and November 2023 with articles focusing on representing public protest, rural engagement and the power of social history to regenerate communities, as well as pieces focusing on projects at Wakefield Museum and the Museum of Liverpool.</p> <p>Journal vol 47 was published in May 2023, focused on activist practice in museums and featuring a review of Queer Britain.</p>

		<p>The free Hardship Membership, begun during Covid, continues to be offered to support those who may otherwise be unable to join SHCG.</p> <p>A bi-monthly 'Legacies of Colonialism' online meetup has continued to be well attended and is run to provide a space for both members and non-members to discuss and support each other with problems, projects or anything else related to colonial histories and other potentially challenging topics in their work.</p> <p>A seminar 'Evolving approaches to text in social history museums' was held online on 22nd March 2024, attracting 23 members and 40 non-members and received broadly positive feedback.</p> <p>The 2023 Conference was held in person in Birmingham 9th June 2023 on the theme of Activism and Professional Practice, attracting 45 delegates, including bursary places to allow early career members to attend. Feedback reflected positively on the mix of sessions including both practical and theoretical case studies, and the lessons learned from the previous year were taken on board, resulting in a noticeable improvement in accessibility.</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	SHCG has carried out its purposes as a charity for the public benefit and, in doing so, can confirm we have had regard to the guidance issued by the Charity Commission on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	n/a
Policy on social investment including program related investment	Para 1.38	n/a
Contribution made by volunteers	Para 1.38	n/a
Other		n/a

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	<p>Membership numbers were recorded for 2023-24 by the Membership Secretary. As of March 2024, SHCG had the following:</p> <ul style="list-style-type: none"> 58 individual print members (reduction of 2 on 2022/23) • 109 individual digital members (reduction of 12 on 2022/23) • 92 institutional members (increase of 2 on 2022/23) 7 Hardship Memberships 25 Student Memberships <p>As of March 2024, SHCG had the following:</p> <ul style="list-style-type: none"> Twitter followers: 4,302 [↑ 1.5%] LinkedIn group followers: 248 [↑ 25%] Facebook page followers: 1301 [↑ 0.5%]

Additional information (optional)

You may choose to include further statements where relevant about:

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

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	As of 31st March 2024, SHCG has healthy finances, as outlined in the attached accounts, and does not have a deficit.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The reserves account provides some stability should there be a significant drop in membership income. SHCG may use some of these funds for longer term project activity such as overhauling the website.
Amount of reserves held	Para 1.22	£5000
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	n/a

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	n/a
Investment policy and objectives including any social investment policy adopted	Para 1.46	n/a
A description of the principal risks facing the charity	Para 1.46	n/a
Other		n/a

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution of a Charitable Incorporated Organisation with voting members other than the charity's trustees.
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	Potential trustees must be members of SHCG and their nomination must be proposed by another member. Nominations are voted on digitally by members and confirmed by a quorum at AGM – those garnering the majority of votes are elected. Trustees are elected for a term of 2 years not serving more than 3 consecutive terms. Trustees in named roles – Chair, Secretary, Treasurer – are elected for 3 years equal to 1 term. All trustees work on a voluntary basis and usually undertake a particular role.

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	All trustees are issued with a copy of the constitution, a role description and handover notes from the retiring trustee who previously held that position.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	SHCG is a Subject Specialist Network (SSN), one of many professional networks operating within the museums and heritage sector in the UK. Representatives from each SSN have formed the SSN Consortium which works collaboratively to support individuals and organisations to care for and use their collections for public benefit.
Relationship with any related parties	Para 1.51	n/a
Other		n/a

Reference and Administrative details

Charity name	Social History Curators Group
Other name the charity uses	SHCG
Registered charity number	1157994

Charity's principal address	c/o St Fagans National Museum of History, St Fagans, Cardiff, CF5 6XB

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	Amy Elizabeth Foulds	Chair		SHCG Membership
2	Lauren May Collier	Secretary		SHCG Membership
3	Samantha Jane Daisley	Treasurer		SHCG Membership
4	Charlotte May Barron			SHCG Membership
5	Aisha Rafi Arif			SHCG Membership
6	Tracey Louise Hebron		From 31 st July 2023	SHCG Membership
7	Louise McAward-White		From 31 st July 2023	SHCG Membership
8	Jill Birrell		From 31 st July 2023	SHCG Membership
9	Henry Joseph Roberts		From 31 st July 2023	SHCG Membership
10	Imogen Amy Clarke		From 31 st July 2023	SHCG Membership
11	Edward Matthew Smith		From 31 st July 2023	SHCG Membership
12	Ivet Ivanova Benova		From 31 st July 2023	SHCG Membership
13	Michelle Lisa Gayle		Until 31 st July 2023	SHCG Membership
14	Elizabeth Mei-Lan Douglas		Until 31 st July 2023	SHCG Membership
15	Kirsty Marie Parsons		Until 31 st July 2023	SHCG Membership
16	Frances Catherine Reed		Until 31 st July 2023	SHCG Membership
17				
18				
19				
20				

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

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

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)

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

--


Other optional information

--

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Amy Elizabeth Foulds	
Position (eg Secretary, Chair, etc)	Chair	
Date	18/12/2024	

SOCIAL HISTORY CURATORS GROUP

SHCG

Receipts and Payments Accounts

**Year Ended
31 March 2024**

**SOCIAL HISTORY CURATORS GROUP
SHCG
Receipts and Payments Accounts
For the Year Ended 31 March 2024**

	2024	2023
Receipts		
Membership Subs	7,307.40	7,026.70
Conference 2022	-	6,319.20
Conference 2023	2,409.14	340.00
Seminars 2022	-	129.02
Seminars 2023	£129.10	-
Seminars 2024	144.16	-
Publications Licensing	36.62	81.62
	<u>10,026.42</u>	<u>13,896.54</u>
Expenses		
Committee Travel	151.89	1,182.22
Conference Expenses 2022	-	4,539.91
Conference Expenses 2023	3,489.19	306.00
Seminar Expenses	-	250.00
First Base	521.05	393.47
Postage & Stationery	435.75	450.86
Newsletter Expenses	2,596.00	2,013.60
Journal Expenses	1,075.90	1,172.30
Accountancy	324.00	312.00
Insurance	356.48	348.71
Sundries & Misc	798.27	517.92
	<u>9,748.53</u>	<u>11,486.99</u>
Net Movement in Funds	<u>277.89</u>	<u>2,409.55</u>
Total Funds Brought Forward	28,287.77	25,878.22
Total Funds Carried Forward	<u>28,565.66</u>	<u>28,287.77</u>

**SOCIAL HISTORY CURATORS GROUP
SHCG
Statement of Balances
For the Year Ended 31 March 2024**

	Unrestricted Funds 2024	Restricted Funds 2024	Total 2024	Total 2023
Current Assets				
Cash in hand	-	-	-	-
CO-OP Current Account	23,565.66	-	23,565.66	23,287.77
CO-OP Reserve Account	5,000.00	-	5,000.00	5,000.00
Net Assets as at 31 March 2024	<u>28,565.66</u>	<u>-</u>	<u>28,565.66</u>	<u>28,287.77</u>
Reserves				
General Funds available as at 1 April 2023	28,287.77	-	28,287.77	25,878.22
Surplus / Deficit for the year As per P&R Account	277.89	-	277.89	2,409.55
Total Funds as at 31 March 2024	<u>28,565.66</u>	<u>-</u>	<u>28,565.66</u>	<u>28,287.77</u>

Signed 

Print Name *SAMANTHA DAISLEY*

Designation *SOCIAL HISTORY CURATORS GROUP TREASURER*

Date *31/10/2024*

Independent examiner's report on the accounts

30 October 2024

To the Members of the Social History Curators Group on the accounts for the year ended 31 March 2024.

This report is made solely to the society's members, as a body. Our examination work has been undertaken so that we might state to the society's members those matters we are required to state to them in an examiners' report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the society and the society's members as a body, for our work, for this report, or for the opinions we have formed.

Respective responsibilities of Society Board Members and examiner

The Society Board Members consider that an audit is not required for this year as an appropriate resolution was approved by members at the last AGM and that an independent examination is therefore appropriate.

It is our responsibility to:

- examine the accounts
- follow the procedures laid down in the General Directions given by Social History Curators Group; and
- state whether particular matters have come to our attention.

Basis of independent examiner's statement

Our examination was carried out in accordance with General Directions given by Social History Curators Group. 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 seeks explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, we do not express an audit opinion on the accounts.

Independent examiner's statement

In the course of our examination, no matter has come to our attention;

1. Which gives us reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records, and
 - to prepare accounts which accord with the accounting records and comply with Generally accepted accounting requirements have not been met, or
2. To which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Z group

Z group
Suite LU.231, The Light Bulb
1 Filament Walk
Wandsworth, London
SW18 4GQ

SOCIAL HISTORY CURATORS' GROUP

England & Wales - Charity number 1157994

Accounts



Trustees' Annual Report for the period

From 01/04/2023 To 31/03/2023

Charity name: Social History Curators Group

Charity registration number: 1157994

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance the education of the public in heritage, science and the arts advancing standards of social history curatorship by encouraging better care, management, research and development of collections and delivery of improved use, access and interpretation of museum and related collections through public facing outputs such as events, exhibitions, participative projects for the benefit of the public
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	<p>SHCG Board of Trustees meetings for 2022-23 returned to in-person meetings, retaining hybrid options to enable as many trustees to attend as possible. Meetings were held at the Museum of the Home and Berwick Museum.</p> <p>SHCG Chair advocated on behalf of various museums and social history collections facing cuts or closures, communicating with Cardiff Council, Bristol Council, Burton-on-Trent Council (including a follow up phone call with the Head of Regeneration), and Cornwall Council.</p> <p>SHCG is represented on the Subject Specialist Networks Consortium by the Chair who has attended meetings online throughout the year. This continues to strengthen relationships and build support between SSNs in sharing resources, best practice and co-hosting training and events. SHCG will continue to be represented in this forum.</p> <p>SHCG News was published in May and November 2022, with articles from various sector practitioners and institutions including Museum of London, Aberdeen City Council Museums and Galleries and the Royal Mint Museum.</p> <p>Journal vol 46 was published in May 2022, focused on empowering communities to tell their own stories and reflecting on practice</p>

		<p>related to climate change and decolonisation.</p> <p>Accessibility and inclusion is now a standing point at all trustee meetings. The free Hardship Membership, begun during lockdown, continues to be offered to support those who may otherwise be unable to join SHCG.</p> <p>A bi-monthly 'Legacies of Colonialism' online meetup has continued to be well attended and is run to provide a space for both members and non-members to discuss and support each other with problems, projects or anything else related to colonial histories and other potentially challenging topics in their work.</p> <p>In December 2022 a seminar was held on the subject of Religion in Museums, with 4 speakers from a range of museums, including St Mungo's Museum and the V&A. This was attended by 26 participants and received positive feedback.</p> <p>The 2022 SHCG Conference was held in person in Leeds on 30th June and 1st July on the theme of Regenerating Communities through social history. Bursaries were offered to allow early career members to attend, and the conference was positively received overall. Conference sessions were made available on the SHCG YouTube channel and lessons learned, particularly around equality, diversity and inclusion and accessibility were taken on board for future events.</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	SHCG has carried out its purposes as a charity for the public benefit and, in doing so, can confirm we have had regard to the guidance issued by the Charity Commission on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	n/a
Policy on social investment including program related investment	Para 1.38	n/a
Contribution made by volunteers	Para 1.38	n/a

Other		n/a

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	<p>Membership numbers were recorded for 2022-23 by the Membership Secretary. As of March 2023, SHCG had the following:</p> <ul style="list-style-type: none"> 60 individual print members (increase of 8 on 2021/22) • 120 individual digital members (increase of 13 on 2021/22) • 90 institutional members (increase of 7 on 2021/22) 7 Hardship Memberships 25 Student Memberships <p>As of March 2023, SHCG had the following:</p> <ul style="list-style-type: none"> Twitter followers: 4.239 [↑ 9%] LinkedIn group followers: 199 [↑ 68%] Facebook page followers: 1295 [↑ 0.7%] YouTube channel Views: 25.4K, [↓ 35%] Most watched video 'Tools of the Trade: 118.8K [↑ 327%] Subscribers: 1980 [↑ 13%]

Additional information (optional)

You may choose to include further statements where relevant about:

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

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	As of 31st March 2023, SHCG has healthy finances, as outlined in the attached accounts, and does not have a deficit.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The reserves account provides some stability should there be a significant drop in membership income. SHCG may use some of these funds for longer term project activity such as overhauling the website.
Amount of reserves held	Para 1.22	£5000
Reasons for holding zero reserves	Para 1.22	n/a
Details of fund materially in deficit	Para 1.24	n/a
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	n/a

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	n/a
Investment policy and objectives including any social investment policy adopted	Para 1.46	n/a
A description of the principal risks facing the charity	Para 1.46	n/a
Other		n/a

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution of a Charitable Incorporated Organisation with voting members other than the charity's trustees.
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	Potential trustees must be members of SHCG and their nomination must be proposed by another member. Nominations are voted on digitally by members and confirmed by a quorum at AGM – those garnering the majority of votes are elected. Trustees are elected for a term of 2 years not serving more than 3 consecutive terms. Trustees in named roles – Chair, Secretary, Treasurer – are elected for 3 years equal to 1 term. All trustees work on a voluntary basis and usually undertake a particular role.

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	All trustees are issued with a copy of the constitution, a role description and handover notes from the retiring trustee who previously held that position.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	SHCG is a Subject Specialist Network (SSN), one of many professional networks operating within the museums and heritage sector in the UK. Representatives from each SSN have formed the SSN Consortium which works collaboratively to support individuals and organisations to care for and use their collections for public benefit.
Relationship with any related parties	Para 1.51	n/a
Other		n/a

Reference and Administrative details

Charity name	Social History Curators Group
Other name the charity uses	SHCG
Registered charity number	1157994

Charity's principal address	c/o St Fagans National Museum of History St Fagans Cardiff CF5 6XB

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	Lowri May Jones	Chair		SHCG Membership
2	Lauren May Collier	Secretary		SHCG Membership
3	Amy Elizabeth Foulds	Treasurer		SHCG Membership
4	Michelle Lisa Gayle			SHCG Membership
5	Elizabeth Mei-Lian Douglas			SHCG Membership
6	Kirsty Marie Parsons			SHCG Membership
7	Frances Catherine Reed			SHCG Membership
8	Charlotte May Barron			SHCG Membership
9	Eleanor Harding		Until 08/07/2022	SHCG Membership
10	Lauren Ryall-Waite		Until 08/07/2022	SHCG Membership
11	Emma Harper		Until 08/07/2022	SHCG Membership
12	Victoria Miller		Until 08/07/2022	SHCG Membership
13	Aisha Rafi Arif		From 08/07/2022	SHCG Membership
14	Samatha Jane Daisley		From 08/07/2022	SHCG Membership
15				
16				
17				
18				
19				
20				

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

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

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)

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

--


Other optional information

--

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Amy Elizabeth Foulds	
Position (eg Secretary, Chair, etc)	Chair	
Date	31/01/2024	

SOCIAL HISTORY CURATORS GROUP

SHCG

Receipts and Payments Accounts

**Year Ended
31 March 2023**

**SOCIAL HISTORY CURATORS GROUP
SHCG
Receipts and Payments Accounts
For the Year Ended 31 March 2023**

	2023	2022
Receipts		
Membership Subs	7,026.70	6,686.28
Conference 2022	6,319.20	-
Conference 2023	340.00	-
Seminars 2022	129.02	-
Publications Licensing	81.62	489.55
	<u>13,896.54</u>	<u>7,175.83</u>
Expenses		
Committee Travel	1,182.22	199.77
Conference Expenses 2021	-	688.68
Conference Expenses 2022	4,539.91	50.00
Conference Expenses 2023	306.00	-
Seminar Expenses	250.00	-
First Base	393.47	393.47
Postage & Stationery	450.86	30.92
Newsletter Expenses	2,013.60	2,263.65
Journal Expenses	1,172.30	1,086.80
Accountancy	312.00	300.00
Insurance	348.71	337.16
Sundries & Misc	517.92	421.59
	<u>11,486.99</u>	<u>5,772.04</u>
Net Movement in Funds	<u>2,409.55</u>	<u>1,403.79</u>
Total Funds Brought Forward	25,878.22	24,474.43
Total Funds Carried Forward	<u><u>28,287.77</u></u>	<u><u>25,878.22</u></u>

**SOCIAL HISTORY CURATORS GROUP
SHCG
Statement of Balances
For the Year Ended 31 March 2023**

	Unrestricted Funds 2023	Restricted Funds 2023	Total 2023	Total 2022
Current Assets				
Cash in hand	-	-	-	-
CO-OP Current Account	23,287.77	-	23,287.77	20,878.22
CO-OP Reserve Account	5,000.00	-	5,000.00	5,000.00
Net Assets as at 31 March 2023	<u>28,287.77</u>	<u>-</u>	<u>28,287.77</u>	<u>25,878.22</u>
Reserves				
General Funds available as at 1 April 2022	25,878.22	-	25,878.22	24,474.43
Surplus / Deficit for the year As per P&R Account	2,409.55	-	2,409.55	1,403.79
Total Funds as at 31 March 2023	<u>28,287.77</u>	<u>-</u>	<u>28,287.77</u>	<u>25,878.22</u>

Signed



Print Name Amy Foulds

Designation SHCG Treasurer

Date 31/08/2023

Independent examiner's report on the accounts

31 July 2023

To the Members of the Social History Curators Group on the accounts for the year ended 31 March 2023.

This report is made solely to the society's members, as a body. Our examination work has been undertaken so that we might state to the society's members those matters we are required to state to them in an examiners' report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the society and the society's members as a body, for our work, for this report, or for the opinions we have formed.

Respective responsibilities of Society Board Members and examiner

The Society Board Members consider that an audit is not required for this year as an appropriate resolution was approved by members at the last AGM and that an independent examination is therefore appropriate.

It is our responsibility to:

- examine the accounts
- follow the procedures laid down in the General Directions given by Social History Curators Group; and
- state whether particular matters have come to our attention.

Basis of independent examiner's statement

Our examination was carried out in accordance with General Directions given by Social History Curators Group. 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 seeks explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, we do not express an audit opinion on the accounts.

Independent examiner's statement

In the course of our examination, no matter has come to our attention;

1. Which gives us reasonable cause to believe that in any material respect the requirements:

- to keep accounting records, and
- to prepare accounts which accord with the accounting records and comply with Generally accepted accounting requirements have not been met, or

2. To which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Z group

Room 405 Highland House

165 The Broadway

Wimbledon, London

SW19 1NE

SOCIAL HISTORY CURATORS' GROUP

England & Wales - Charity number 1157994

Accounts



Trustees' Annual Report for the period

Period start date To 1st April 2021

Period end date 31st March 2022

Charity name: Social History Curators Group

Charity registration number: 1157994

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance the education of the public in heritage, science and the arts advancing standards of social history curatorship by encouraging better care, management, research and development of collections and delivery of improved use, access and interpretation of museum and related collections through public facing outputs such as events, exhibitions, participative projects for the benefit of the public
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	<p>The COVID-19 pandemic continued to have an effect on the activities of SHCG in the year 2021-2022. SHCG Board of Trustees meetings for 2021-22 have been held via Zoom due to the COVID-19 pandemic and working from home guidance.</p> <p>SHCG News was published in May and October 2021 with articles from The People's History Museum, Imperial War Museums, Wakefield Museums & Castles, Darlington Railway Museum and more.</p> <p>Journal vol 45 was published in May 2021 themed around reflections on and experiences of working during 2020 in the context of a global pandemic.</p> <p>On Wednesday 6th and Thursday 7th October SHCG's 2021 conference, 'Challenging Social History: Navigating difficulties and caring for contested collections', was successfully held online with over 100 attendees on one of the days. We carried out an online survey after this conference. Over half those who responded said it was their first experience of an SHCG conference and the main reason for attendance was the relevance of the theme to their work and professional development.</p> <p>Access and Inclusion was a key area of work for the committee this year and will continue to be a focus in 2022/23. An online, anonymous application process for new SHCG trustees was trialled in 2021 and will be continued to improve accessibility, following positive feedback in 2021.</p>

		<p>Accessibility and inclusion is now a standing point at all trustee meetings. The free Hardship Membership, begun during lockdown, continues to be offered to support those who may otherwise be unable to join SHCG.</p> <p>A bi-monthly 'Legacies of Colonialism' online meetup has been run to provide a space for both members and non-members to discuss and support each other with problems, projects or anything else related to colonial histories and other potentially challenging topics in their work.</p> <p>SHCG is represented on the Subject Specialist Networks Consortium by the Chair who has attended meetings online throughout the year. This continues to strengthen relationships and build support between SSNs in sharing resources, best practice and co-hosting training and events. SHCG will continue to be represented in this forum.</p> <p>SHCG has carried out advocacy work on behalf of various museums and social history collections facing cuts or closures, involving communication with a number of local councils and councillors.</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	SHCG has carried out its purposes as a charity for the public benefit and, in doing so, can confirm we have had regard to the guidance issued by the Charity Commission on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	N/A
Policy on social investment including program related investment	Para 1.38	N/A
Contribution made by volunteers	Para 1.38	N/A
Other		N/A

Achievements and Performance

	SORP reference	

<p>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.</p>	<p>Para 1.20</p>	<p>Membership numbers were recorded for 2021-22 by the Membership Secretary. As of March 2022, SHCG had the following: 52 individual print members (increase of 3 on 2021/22)</p> <ul style="list-style-type: none"> • 107 individual digital members (decrease of 1 on 2021/22) • 83 institutional members, including 3 overseas (no change) • 7 Hardship Memberships • 25 Student Memberships <p>As of March 2022, SHCG had the following:</p> <ul style="list-style-type: none"> • Twitter followers: 3884 [↑ 14%] • LinkedIn group followers: 118 [↑ 146%] • Facebook page followers: 1286 [↑ 2%] • Youtube channel Views: *38K, [↑35%] Subscribers: 1746 [↑ 27%]
--	------------------	---

Additional information (optional)

You may choose to include further statements where relevant about:

<p>Achievements against objectives set</p>	<p>Para 1.41</p>	<p>N/A</p>
<p>Performance of fundraising activities against objectives set</p>	<p>Para 1.41</p>	<p>N/A</p>
<p>Investment performance against objectives</p>	<p>Para 1.41</p>	<p>N/A</p>
<p>Other</p>		<p>N/A</p>

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	As of 31st March 2020, SHCG has healthy finances, as outlined in the attached accounts, and does not have a deficit.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The reserves account provides some stability should there be a significant drop in membership income. SHCG may use some of these funds for longer term project activity such as overhauling the website.
Amount of reserves held	Para 1.22	£5000
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	N/A

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	N/A
Investment policy and objectives including any social investment policy adopted	Para 1.46	N/A
A description of the principal risks facing the charity	Para 1.46	N/A
Other		N/A

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution of a Charitable Incorporated Organisation with voting members other than the charity's trustees.
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	Potential trustees must be members of SHCG and their nomination must be proposed by another member. Nominations are voted on by those members present at AGM – those garnering the majority of votes are elected. Trustees are elected for a term of 2 years not serving more than 3 consecutive terms. Trustees in named roles – Chair, Secretary, Treasurer – are elected for 3 years equal to 1 term. All trustees work on a voluntary basis and usually undertake a particular role.

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	All trustees are issued with a copy of the constitution, a role description and handover notes from the retiring trustee who previously held that position.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	SHCG is a Subject Specialist Network (SSN), one of many professional networks operating within the museums and heritage sector in the UK. Representatives from each SSN have formed the SSN Consortium which works collaboratively to support individuals and organisations to care for and use their collections for public benefit.
Relationship with any related parties	Para 1.51	N/A
Other		N/A

Reference and Administrative details

Charity name	Social History Curators Group
Other name the charity uses	SHCG
Registered charity number	1157994

Charity's principal address	c/o St Fagans National Museum of History St Fagans Cardiff CF5 6XB

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	Lowri May Jones	Chair	From 24/06/2021	SHCG Membership
2	Lauren May Stephenson	Secretary	From 24/06/2021	SHCG Membership
3	Amy Elizabeth Foulds	Treasurer	From 24/06/2021	SHCG Membership
4	Eleanor Harding			SHCG Membership
5	Frances Catherine Reed		From 24/06/2021	SHCG Membership
6	Michelle Lisa Gayle		From 24/06/2021	SHCG Membership
7	Elizabeth Mei-Lan Douglas		From 24/06/2021	SHCG Membership
8	Charlotte May Barron		From 24/06/2021	SHCG Membership
9	Lauren Ryall-Waite			SHCG Membership
10	Emma Harper			SHCG Membership
11	Victoria Miller			SHCG Membership
12	Kirsty Marie Parsons		From 24/06/2021	SHCG Membership

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

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

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)

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

--


Other optional information

--

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	LAUREN MAY COLLIER	
Position (eg Secretary, Chair, etc)	Secretary	
Date	4.1.2023	

SOCIAL HISTORY CURATORS GROUP

SHCG

Receipts and Payments Accounts

**Year Ended
31 March 2022**

**SOCIAL HISTORY CURATORS GROUP
SHCG
Receipts and Payments Accounts
For the Year Ended 31 March 2022**

	2022	2021
Receipts		
Membership Subs	6,686.28	9,550.85
Seminars	-	307.62
Publications Licensing	489.55	1,064.12
Sundries & Misc	-	123.80
	<u>7,175.83</u>	<u>11,046.39</u>
Expenses		
Committee Travel	199.77	57.56
Conference Expenses 2021	688.68	-
Conference Expenses 2022	50.00	-
Seminar Expenses	-	348.00
First Base	393.47	380.16
Postage & Stationery	30.92	341.65
Newsletter Expenses	2,263.65	2,233.16
Journal Expenses	1,086.80	1,487.44
Accountancy	300.00	300.00
Insurance	337.16	-
Sundries & Misc	421.59	914.52
	<u>5,772.04</u>	<u>6,062.49</u>
Net Movement in Funds	<u>1,403.79</u>	<u>4,983.90</u>
Total Funds Brought Forward	24,474.43	19,490.53
Total Funds Carried Forward	<u><u>25,878.22</u></u>	<u><u>24,474.43</u></u>

**SOCIAL HISTORY CURATORS GROUP
SHCG
Statement of Balances
For the Year Ended 31 March 2022**

	Unrestricted Funds 2022	Restricted Funds 2022	Total 2022	Total 2021
Current Assets				
Cash in hand	-	-	-	-
CO-OP Current Account	20,878.22	-	20,878.22	19,474.43
CO-OP Reserve Account	5,000.00	-	5,000.00	5,000.00
Net Assets as at 31 March 2022	<u><u>25,878.22</u></u>	<u><u>-</u></u>	<u><u>25,878.22</u></u>	<u><u>24,474.43</u></u>
Reserves				
General Funds available as at 1 April 2021	24,474.43	-	24,474.43	19,490.53
Surplus / Deficit for the year As per P&R Account	1,403.79	-	1,403.79	4,983.90
Total Funds as at 31 March 2022	<u><u>25,878.22</u></u>	<u><u>-</u></u>	<u><u>25,878.22</u></u>	<u><u>24,474.43</u></u>

Signed



Print Name AMY FOULDS

Designation SHCG TREASURER

Date 08/07/2022

Independent examiner's report on the accounts

10 July 2022

To the Members of the Social History Curators Group on the accounts for the year ended 31 March 2022 .

This report is made solely to the society's members, as a body. Our examination work has been undertaken so that we might state to the society's members those matters we are required to state to them in an examiners' report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the society and the society's members as a body, for our work, for this report, or for the opinions we have formed.

Respective responsibilities of Society Board Members and examiner

The Society Board Members consider that an audit is not required for this year as an appropriate resolution was approved by members at the last AGM and that an independent examination is therefore appropriate.

It is our responsibility to:

- examine the accounts
- follow the procedures laid down in the General Directions given by Social History Curators Group; and
- state whether particular matters have come to our attention.

Basis of independent examiner's statement

Our examination was carried out in accordance with General Directions given by Social History Curators Group. 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 seeks explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and, consequently, we do not express an audit opinion on the accounts.

Independent examiner's statement

In the course of our examination, no matter has come to our attention;

1. Which gives us reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records, and
 - to prepare accounts which accord with the accounting records and comply with Generally accepted accounting requirements have not been met, or
2. To which, in our opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Z group
Ibex House
162-164 Arthur Road
Wimbledon
London
SW19 8AQ

SOCIAL HISTORY CURATORS' GROUP

England & Wales - Charity number 1157994

Accounts



Trustees' Annual Report for the period

From 1st April 2020 Period start date To 31st March 2021 Period end date

Charity name: Social History Curators Group (SHCG)

Charity registration number: 1157994

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	To advance the education of the public in heritage, science and the arts advancing standards of social history curatorship by encouraging better care, management, research and development of collections and delivery of improved use, access and interpretation of museum and related collections through public-facing outputs such as events, exhibitions, participative projects for the benefit of the public.
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	<p>The COVID-19 pandemic had a significant impact on the activities of SHCG in the year 2020-21.</p> <p>A seminar on Rationalisation and Disposal that was due to take place on 25th March at Black Country Living Museum was cancelled due to lockdown. In its place an online seminar run in conjunction with the Collections Trust facilitated an online Q&A on this subject on 15th May. It focussed on providing advice to sector professionals on this area of museum collections management.</p> <p>An online Twitter session was run via the handle @MuseumHour, a popular heritage sector online discussion facilitator, on 27 April 2020. It focussed on the future of collecting.</p> <p>SHCG took part in a session titled 'Let's get digital: managing social history collections in a digital age' at the Museums Association conference on 6 Nov 2020 about Subject Specialist Networks (SSNs), focussing on how SHCG can support individual heritage professionals.</p> <p>The annual conference was also postponed due to COVID and was</p>

		<p>rescheduled for Autumn 2021.</p> <p>SHCG News was published in April and November 2020.</p> <p>'Social History in Museums'. SHCG Journal vol 44 was published in April 2020, themed on new ways of looking at old stories.</p> <p>SHCG is represented on the Subject Specialist Networks Consortium and attended meetings on 11 Feb 2021 (full consortium meeting), 10th Dec 2020 (meeting of the executive group), 14th May 2020 (meeting of the executive group), 1st May 2020 (consortium). This continues to strengthen relationships and build support between SSNs in sharing resources, best practice and co-hosting training and events. SHCG will continue to be represented in this forum.</p> <p>Work to improve data security was carried out during 2020-21. A GDPR and Privacy statement has been drawn up and added to the website, and two new policies implemented; a Data Protection Policy in March 2021, and an Information Security Policy was drafted in the same period (approved in June 2020).</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	SHCG has carried out its purposes as a charity for the public benefit and, in doing so, can confirm we have had regard to the guidance issued by the Charity Commission on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	N/A
Policy on social investment including program related investment	Para 1.38	N/A
		N/A

Contribution made by volunteers	Para 1.38	
Other		N/A

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	<p>During the 2020-21 year, membership numbers were recorded by the Membership Secretary. As of March 2021, SHCG had the following:</p> <p>49 individual print members 108 individual digital members 83 institutional members, including 3 overseas</p> <p>As of March 2020, SHCG had the following:</p> <p>Twitter followers: 3396 LinkedIn group followers: 48 Facebook page followers: 1255</p> <p>A Hardship Membership was initiated in November 2020 and offered free to anyone experiencing negative impacts from the COVID-19 pandemic.</p> <p>Work to improve the diversity and inclusivity of SHCG was begun with the Board of Trustees holding a discussion on diversity and inclusion in January 2021. Actions from this meeting including the development of an SHCG Access and Inclusion Policy, and holding a wider discussion open to members and non-members to inform policy development, actions which have been carried into the 2021-22 period. The Membership Secretary has also been supported by the committee to develop and amend the application process for trustee, to be trialled during the 2021 AGM elections.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against	Para 1.41	N/A
----------------------	-----------	-----

objectives set		
Performance of fundraising activities against objectives set	Para 1.41	N/A
Investment performance against objectives	Para 1.41	N/A
Other		N/A

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	As of 31st March 2021, SHCG has healthy finances, as outlined in the attached accounts, and does not have a deficit.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	The reserves account provides some stability should there be a significant drop in membership income. SHCG may use some of these funds for longer term project activity such as overhauling the website.
Amount of reserves held	Para 1.22	£5000
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	N/A
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	N/A

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	N/A
Investment policy and objectives including any social investment policy adopted	Para 1.46	N/A
A description of the principal risks facing the charity	Para 1.46	N/A
Other		N/A

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Constitution of a Charitable Incorporated Organisation with voting members other than the charity's trustees.
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
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	Potential trustees must be members of SHCG and their nomination must be proposed by another member. Nominations are usually voted on by those members present at AGM - those garnering the majority of votes are elected. In 2020 the AGM was held online and an election took place via Survey Monkey prior to the AGM due to the COVID-19 pandemic. The results of the election were announced during the AGM. Trustees are elected for a term of 2 years not serving more than 3 consecutive terms. Trustees in named roles – Chair, Secretary, Treasurer – are elected for 3 years equal to 1 term. All trustees work on a voluntary basis and usually undertake a particular role

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	All trustees are issued with a copy of the constitution, a role description and handover notes from the retiring trustee who previously held that position, as well as being provided with access to all SHCG policies.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	SHCG is a Subject Specialist Network (SSN), one of many professional networks operating within the museums and heritage sector in the UK. Reps from each SSN have formed the SSN Consortium which works collaboratively to support individuals and organisations to care for and use their collections for public benefit.
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	Social History Curators Group
--------------	-------------------------------

Other name the charity uses	SHCG
Registered charity number	1157994
Charity's principal address	c/o St Fagans National Museum of History, St Fagans, Cardiff, CF5 6XB

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	Verity Smith	Chair		SHCG Membership
2	Lowri Jones	Treasurer		SHCG Membership
3	Jessica McKenzie	Secretary		SHCG Membership
4	Eleanor Harding		From 25 th June 2020	SHCG Membership
5	Georgina Ascroft			SHCG Membership
6	Lisa Peatfield			SHCG Membership
7	Jessie Petheram			SHCG Membership
8	Matt Exley			SHCG Membership
9	Helen Taylor			SHCG Membership
10	Lauren Ryall-Waite		From 25 th June 2020	SHCG Membership
11	Emma Harper		From 25 th June 2020	SHCG Membership
12	Victoria Miller		From 25 th June 2020	SHCG Membership
13	Nita Acharya		Stepped down as Trustee 25/6/2020	SHCG Membership
14	Rebecca Lewis		Stepped down as Trustee 25/6/2020	SHCG Membership
15	Alison Grange		Stepped down as Trustee 25/6/2020	SHCG Membership
16				
17				
18				
19				
20				

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

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

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/

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)

--

Exemptions from disclosure

Reason for non-disclosure of key personnel details

N/A


Other optional information

N/A

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Lauren May Stephenson	
Position (eg Secretary, Chair, etc)	Secretary	
Date	19/12/2021	

SOCIAL HISTORY CURATORS GROUP

SHCG

Receipts and Payments Accounts


**Year Ended
31 March 2021**

**SOCIAL HISTORY CURATORS GROUP
SHCG
Receipts and Payments Accounts
For the Year Ended 31 March 2021**

	2021	2020
Receipts		
Conference Receipts 2019	-	11,533.50
Conference Receipts 2020	-	
Membership Subs	9,550.85	7,426.58
Seminars	307.62	290.00
Publications Licensing	1,064.12	2,164.78
Sundries & Misc	123.80	-
	<u>11,046.39</u>	<u>21,414.86</u>
Expenses		
Committee Travel	57.56	899.20
Conference Expenses 2019	-	9,919.53
Conference Expenses 2020	-	-
Seminar Expenses	348.00	1,037.75
First Base	380.16	345.60
Postage & Stationery	341.65	41.88
Newsletter Expenses	2,233.16	2,037.07
Journal Expenses	1,487.44	1,309.33
Accountancy	300.00	300.00
Sundries & Misc	914.52	545.53
	<u>6,062.49</u>	<u>16,435.89</u>
Net Movement in Funds	<u>4,983.90</u>	<u>4,978.97</u>
Total Funds Brought Forward	19,490.53	14,511.56
Total Funds Carried Forward	<u><u>24,474.43</u></u>	<u><u>19,490.53</u></u>

**SOCIAL HISTORY CURATORS GROUP
SHCG
Statement of Balances
For the Year Ended 31 March 2021**

	Unrestricted Funds 2021	Restricted Funds 2021	Total 2021	Total 2020
Current Assets				
Cash in hand	-	-	-	-
CO-OP Current Account	19,474.43	-	19,474.43	14,490.53
CO-OP Reserve Account	5,000.00	-	5,000.00	5,000.00
Net Assets as at 31 March 2021	24,474.43	-	24,474.43	19,490.53
Reserves				
General Funds available as at 1 April 2020	19,490.53	-	19,490.53	14,511.56
Surplus / Deficit for the year As per P&R Account	4,983.90	-	4,983.90	4,978.97
Total Funds as at 31 March 2021	24,474.43	-	24,474.43	19,490.53

Signed 
 Print Name *Lowri Jones*
 Designation *SHCG Treasurer*
 Date *24/06/2021*