



CHARITY COMMISSION
FOR ENGLAND AND WALES

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) <p>7 Hardship Memberships 25 Student Memberships</p> <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)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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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)		
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	28,565.66	-	28,565.66	28,287.77
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	28,565.66	-	28,565.66	28,287.77

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
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