



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	Day 01	Month 01	Year 2021		Day 31	Month 12	Year 2021

Section A Reference and administration details

Charity name Dorset Record Society

Other names charity is known by

Registered charity number (if any) 1165078

Charity's principal address Dorset History Centre

Bridport Road

DORCHESTER

Postcode DT1

1RP

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	Sam Johnston	Chairman		
2	Ann Smith	Secretary		
3	Geoff Smith	Treasurer		
4	Mark Forrest	Editor		
5	Martin Ayres			
6	John Chandler			
7	Graham Hoddinott			
8	Katherine Barker			
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Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

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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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	Charitable Incorporated Organization
Trustee selection methods (eg. appointed by, elected by)	Elected by the Trustees

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

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Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

To advance the education of the public in the subject of history, and to facilitate historical research by the publication, distribution and interpretation of archival texts, records and study guides relating to the county of Dorset.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The Trustees held the sixth AGM at Dorset History Centre on 7th April 2022 to discuss Record Society business. The accounts and the minutes of the previous meeting in 2021 were approved. The Thomas Rackett Papers, 1786-1840 were published in December 2021. A second edition of the Minute Book of Weymouth and Melcombe Regis 1625-1660 containing a few corrections to the captions will be issued shortly. Further volumes nearly ready for publication include Corfe Castle census and associated documents and the Medieval Fraternity of Bridport. Work is still in progress on the Dorset Lay Subsidy of 1628, the detached portion of the Minutes of the Dorset Standing Committee 1646, Sherborne wills and inventories, the Dorchester Offenders Book 1620s and 1630s, and Witchcraft in Dorset. It was hoped to produce a volume on the earliest Motor Tax records of Dorset, but formidable difficulties with the text have regretfully caused the Trustees to abandon this project. New texts suggested for future volumes include the Churchwarden's presentments for the Dorset peculiars of the Dean of Sarum, 1550-1603 and the 18th century political diaries of Henry Bankes. The churchwarden's presentments have been digitized and work will start on them when other texts are finished. Outlets for selling our books were severely affected during the pandemic, and some of our core outlets have since disappeared. Dorset County Museum has now re-opened after major building work, but the new shop does not sell academic books. Dorset History Centre has re-opened to the public, but on a reduced basis which is affecting footfall and potential sales of our books. Sales are continuing through online outlets such as Amazon. We are contacting independent bookshops to strengthen our links with them. The South-West regional meeting of the British Association for Local History may take place in the Autumn. If it goes ahead, one of the Trustees and the Secretary will man a bookstall for Dorset Record Society.

The Trustees have had regard to the guidance issued by the Charity Commission on public benefit in running the charity.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Summary of the main achievements of the charity during the year

We have published one new volume in the last year, The Thomas Rackett Papers, 1786-1840. Two more volumes are almost ready for publication. As a result of the pandemic, opportunities to sell our volumes have been reduced, and we are actively seeking new outlets.

Section E Financial review

Brief statement of the charity's policy on reserves

Sales of books provide income for future publications.
All funds are held in the DRS bank account.
There are no separate reserves but the Treasurer and Trustees have agreed a policy that no more than 50% of available funds may be committed to a new publication and that a minimum balance of £500 pounds will be maintained in the DRS bank account.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Section F Other optional information

Section G Declaration

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

Signed on behalf of the charity's trustees

Signature(s) P.A. Smith

Full name(s) Patricia Ann Smith

Position (eg Secretary, Chair, etc) Secretary

Date 3th May 2022

Dorset Record Society

RECEIPTS AND PAYMENTS ACCOUNT - 2021

	£	£		£	£
Opening Balance on 1st January 2021			Printing & publication costs	289.29	
Lloyds Bank	9265.74		Editorial expenses	0.00	
			Secretarial expenses	0.00	
		9265.74	Bank charges	0.00	
			Refunds	0.00	
					289.29
DRS Book Sales	489.82		Balance at 31st December 2021		
Other Sales	0.00				
Grants	0.00		Lloyds Bank	9466.27	
Donations	0.00				
		489.82			9466.27
		9755.56			9755.56

Income and Expenditure: 2021

Income:	489.82
Expenditure	289.29
Contingent Liabilities	0.00
Surplus:	200.53

G M Smith
Hon. Treasurer
Date: 5th January 2022