

Report of the Trustees and  
Unaudited Financial Statements for the Year Ended 31 December 2020  
for  
Free UK Genealogy CIO

Walker & Co  
Chartered Accountants  
Belgrave House  
15 Belgrave Crescent  
Scarborough  
North Yorkshire  
YO11 1UB

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for the Year Ended 31 December 2020

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Report of the Trustees  
for the Year Ended 31 December 2020

The trustees present their report with the financial statements of the charity for the year ended 31 December 2020. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) 'Accounting and Reporting by Charities' issued in March 2005.

**REFERENCE AND ADMINISTRATIVE DETAILS**

**Registered Charity number**

1167484

**Principal address**

Westwood House  
Westwood  
Scarborough  
North Yorkshire  
YO11 2JD

**Trustees**

Baroness C G W Gemmingen Von Massenbach

Mr R B Light

Mr B R T Laurie

Mr D Mayall

Mr J Killock

- resigned 18.5.20

Mr G Hart

Mr G Abraini

Mr A Turvey

Dr A Eveleigh

Mrs K Streatfield

- appointed 14.11.20

**Independent examiner**

Walker & Co  
Chartered Accountants  
Belgrave House  
15 Belgrave Crescent  
Scarborough  
North Yorkshire  
YO11 1UB

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

The Trustees have assessed the major risks to which the charity is exposed, in particular those related to the operations and finances of the charity, and are satisfied that systems and procedures are in place to mitigate our exposure to the major risks.

Skills audits were undertaken of both Trustees and the Advisory Board. A report on the findings was considered by Trustees at their January 2020 Meeting, and a new Trustee role, with special interest in leading volunteers (including some other Trustees) in fundraising from grants and trusts will be recruited.

Risks were considered as a standing agenda item. Risks continued to be evaluated and actions recorded in a Risk Register which provides Trustees with live information on risks to the organisation as a systematic part of the governance process. Major risks continued to be access to public records and ongoing financial sustainability, risks in outdated transcription tools and project management of new projects.

During the year, the writing and renewal of key policies was paused and resumed in 2021.

## **OBJECTIVES AND ACTIVITIES**

### **Objectives and aims**

Our mission is for a more open, more sustainable genealogy.

Our charitable objects are:

- a) To advance for the public benefit the making of family and wider history records available under open data formats
- b) To promote education of the general public by the development of open source tools to support community transcription of historical documents
- c) Subject to the consent of the relevant authority, the provision of databases of information and associated digitised images of records of genealogical or historical significance (including, but not restricted to, the records or indexes to records of birth, marriage and death, parish registers, census records, electoral registers, directories and wills).

Free UK Genealogy CIO runs projects under the names FreeBMD, FreeCEN, FreePROBATE and FreeReg.

## **ACHIEVEMENT AND PERFORMANCE**

Our forward plan continued to challenge us to be more open, more sustainable including being open about what we do, open about data and source code, open to partnerships, open to volunteers, open to users, open for business, and to support openness in genealogy more widely.

In pursuit of these goals we;

- a) reversed a significant drop in our advertising income
- b) participated in 48in48.org challenge to advance the transfer of [www.freeukgenealogy.org.uk](http://www.freeukgenealogy.org.uk) from Craft to Wordpress
- c) continued with the development of the new FreeBMD website
- d) developed new systems for transcribing, proofreading and validating censuses, using the new FreeCEN website
- e) added 10 million records to [www.freebmd.org.uk](http://www.freebmd.org.uk) bringing the total to 366 million
- f) added 2 million records to [www.freecen.org.uk](http://www.freecen.org.uk) bringing the total to 40 million
- g) added 3.5 million records to [www.freereg.org.uk](http://www.freereg.org.uk) bringing the total to 50 million
- h) recruited 392 additional volunteers
- i) began an overhaul of the documentation provided to technical volunteers, including developing markup standards
- j) Pat Reynolds (Executive Director) was appointed to the User Advisory Board of The National Archives
- k) created 4 new posts on our website

On the way to the station after our 2019 conference we came up with the idea of making the theme of our next conference 'Open, Global, Genealogy' ... and that in order to make the conference globally open we would need to hold it online, and split it so that no-one would have to stay up all night to take part. Due to pressure of work, we took the decision to delay the conference to 2021.

Those pressures of work arose from the agreed balanced budget for 2020 rapidly becoming unachievable. Most staff were placed on furlough at some point (the exceptions being the 6 hours a week book-keeper and 4 hours a week digitizer). We diverted paid staff work to income generation. These measures meant we were nevertheless able to end the year in the financial situation that we had started it.

We were able to recruit many new tech volunteers who were often on furlough themselves, or were looking for worthwhile new challenges during lockdowns. It is due to these new volunteers, existing volunteers who took on new or additional work, and the staff and Trustees that we managed to accomplish a great deal in 2020. Sadly some volunteers died during the year, and we particularly note the passing of John Pingram, a coordinator in FreeBMD who had been in this role since 2003.

Report of the Trustees  
for the Year Ended 31 December 2020

**ACHIEVEMENT AND PERFORMANCE**

Project	Total volunteers at Year end	Volunteer growth in year	Total records at year end	Records added in year
FreeBMD	524	Reduced 77	366,551,777	9,830,322
FreeCEN	1296	398	40,332,163 <sup>1</sup>	C 1.8 million
FreeREG	2980	71	50,705,049	3,996,824

**FINANCIAL REVIEW**

Since the early 2010s, FreeUK Genealogy has been operating using its substantial reserves. In 2016 we recognised that this could not go on forever, and began to reduce our outgoings while seeking to maximise our income. We started 2020 with a balanced projected budget, but the partnership with MonetizeMore, an advertising reseller did not continue to work well for us in 2020 and by April, we recognised a need to reduce staffing - which has been done without financially penalising staff, thanks to the governments' furlough schemes. We made changes that addressed the impact of Covid-19 on our advertising albeit by making advertising on the sites more obtrusive. We were also delighted to receive substantial increases in our revenue from donations.

At the end of 2020, the charity held £52,000 in reserves (£41,000 in an interest bearing account, and £11,000 prepaid server costs): this is to cover the costs of reducing staff and commitments to meet a low income (sufficient for covering transition costs to running Free UK Genealogy as a volunteer-only charity).

Approved by order of the board of trustees on 30 September 2021 and signed on its behalf by:

Mr R B Light - Trustee

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<sup>1</sup> At 331 March 2021 - data not collected at 31 December 2020

Independent Examiner's Report to the Trustees of  
Free UK Genealogy CIO

I report on the accounts for the year ended 31 December 2020, which are set out on pages five to ten.

**Responsibilities and basis of report**

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I have examined your charity's accounts as required under section 145 of the Charities Act 2011 ('the Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

My role is to state whether any material matters have come to my attention giving me cause to believe:

1. that accounting records were not kept as required by section 130 of the Act; or
2. that the accounts do not accord with those records; or
3. that the accounts do not comply with the accounting requirements of the Act; or
4. that there is further information needed for a proper understanding of the accounts.

**Independent examiner's statement**

I have completed my examination and have no concerns in respect of the matters (1) to (4) listed above and, in connection with following the Directions of the Charity Commission I have found no matters that require drawing to your attention.

John Richard Flinton  
ACA FCCA  
Walker & Co  
Chartered Accountants  
Belgrave House  
15 Belgrave Crescent  
Scarborough  
North Yorkshire  
YO11 1UB

30 September 2021

Free UK Genealogy CIO

Statement of Financial Activities  
for the Year Ended 31 December 2020

		31.12.20 Unrestricted fund £	31.12.19 Total funds £
<b>INCOME</b>			
<b>Incoming resources from generated funds</b>			
Donation income		90,467	114,401
Activities for generating funds	2	10,597	9,295
Investment income	3	<u>314</u>	<u>544</u>
<b>Total incoming resources</b>		101,378	124,240
<b>EXPENDITURE</b>			
<b>Costs of generating funds</b>			
Costs of generating voluntary income		-	2,728
Charitable activities		112,067	143,784
<b>Governance costs</b>		3,310	4,044
<b>Other resources expended</b>		<u>105</u>	<u>60</u>
<b>Total resources expended</b>		115,482	150,616
<b>NET INCOMING/(OUTGOING) RESOURCES</b>			
		(14,104)	(26,376)
<b>RECONCILIATION OF FUNDS</b>			
<b>Total funds brought forward</b>		<u>72,109</u>	<u>98,485</u>
<b>TOTAL FUNDS CARRIED FORWARD</b>		<u><u>58,005</u></u>	<u><u>72,109</u></u>

The notes form part of these financial statements

Free UK Genealogy CIO

Balance Sheet

At 31 December 2020

		31.12.20 Unrestricted fund £	31.12.19 Total funds £
<b>FIXED ASSETS</b>	Notes		
Investments	6	10	10
<b>CURRENT ASSETS</b>			
Debtors	7	-	213
Cash at bank		<u>63,035</u>	<u>75,997</u>
		63,035	76,210
<b>CREDITORS</b>			
Amounts falling due within one year	8	(5,040)	(4,111)
		<u>57,995</u>	<u>72,099</u>
<b>NET CURRENT ASSETS</b>			
		<u>57,995</u>	<u>72,099</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>			
		58,005	72,109
<b>NET ASSETS</b>		<u>58,005</u>	<u>72,109</u>
<b>FUNDS</b>	9		
Unrestricted funds		<u>58,005</u>	<u>72,109</u>
<b>TOTAL FUNDS</b>		<u>58,005</u>	<u>72,109</u>

The financial statements were approved by the Board of Trustees on 30 September 2021 and were signed on its behalf by:

Mr R B Light -Trustee

The notes form part of these financial statements



Notes to the Financial Statements  
for the Year Ended 31 December 2020

**1. ACCOUNTING POLICIES**

**Accounting convention**

The financial statements have been prepared under the historical cost convention, with the exception of investments which are included at market value, and in accordance with the Financial Reporting Standard for Smaller Entities (effective April 2008), the Charities Act 2011 and the requirements of the Statement of Recommended Practice, Accounting and Reporting by Charities.

**Incoming resources**

All incoming resources are included on the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy.

**Resources expended**

Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

**Taxation**

The charity is exempt from tax on its charitable activities.

**Fund accounting**

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

**Pension costs and other post-retirement benefits**

The charity operates a defined contribution pension scheme. Contributions payable to the charity's pension scheme are charged to the Statement of Financial Activities in the period to which they relate.

**2. ACTIVITIES FOR GENERATING FUNDS**

	31.12.20	31.12.19
	£	£
Funds generated through sale of advertising	<u>10,597</u>	<u>9,295</u>

**3. INVESTMENT INCOME**

	31.12.20	31.12.19
	£	£
Interest receivable	<u>314</u>	<u>544</u>

Notes to the Financial Statements - continued  
for the Year Ended 31 December 2020

**4. TRUSTEES' REMUNERATION AND BENEFITS**

There were no trustees' remuneration or other benefits for the year ended 31 December 2020 nor for the year ended 31 December 2019.

**Trustees' expenses**

There were no trustees' expenses paid for the year ended 31 December 2020 nor for the year ended 31 December 2019.

**5. STAFF COSTS**

	31.12.20	31.12.19
	£	£
Wages and salaries	84,147	113,115
Social security costs	7,309	10,074
Other pension costs	<u>2,697</u>	<u>2,966</u>
	<u>94,153</u>	<u>126,155</u>

The average monthly number of employees during the year was as follows:

31.12.20	31.12.19
<u>6</u>	<u>7</u>

No employees received emoluments in excess of £60,000.

**6. FIXED ASSET INVESTMENTS**

	Unlisted investments £
<b>MARKET VALUE</b>	
At 1 January 2020 and 31 December 2020	<u>10</u>
<b>NET BOOK VALUE</b>	
At 31 December 2020	<u>10</u>
At 31 December 2019	<u>10</u>

There were no investment assets outside the UK.

**7. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	31.12.20	31.12.19
	£	£
Other debtors	<u>-</u>	<u>213</u>

Notes to the Financial Statements - continued  
for the Year Ended 31 December 2020

**8. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR**

	31.12.20	31.12.19
	£	£
Taxation and social security	1,996	2,058
Other creditors	<u>3,044</u>	<u>2,053</u>
	<u>5,040</u>	<u>4,111</u>

**9. MOVEMENT IN FUNDS**

	At 1.1.20	Net movement in funds	At 31.12.20
	£	£	£
<b>Unrestricted funds</b>			
General fund	72,109	(14,104)	58,005
	<hr/>	<hr/>	<hr/>
<b>TOTAL FUNDS</b>	<u>72,109</u>	<u>(14,104)</u>	<u>58,005</u>

Net movement in funds, included in the above are as follows:

	Incoming resources	Resources expended	Movement in funds
	£	£	£
<b>Unrestricted funds</b>			
General fund	101,378	(115,482)	(14,104)
	<hr/>	<hr/>	<hr/>
<b>TOTAL FUNDS</b>	<u>101,378</u>	<u>(115,482)</u>	<u>(14,104)</u>

**Comparatives for movement in funds**

	At 1.1.19	Net movement in funds	At 31.12.19
	£	£	£
<b>Unrestricted Funds</b>			
General fund	98,485	(26,376)	72,109
	<hr/>	<hr/>	<hr/>
<b>TOTAL FUNDS</b>	<u>98,485</u>	<u>(26,376)</u>	<u>72,109</u>

Notes to the Financial Statements - continued  
for the Year Ended 31 December 2020

**9. MOVEMENT IN FUNDS - continued**

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	124,240	(150,616)	(26,376)
	<hr/>	<hr/>	<hr/>
<b>TOTAL FUNDS</b>	<u>124,240</u>	<u>(150,616)</u>	<u>(26,376)</u>

A current year 12 months and prior year 12 months combined position is as follows:

	At 1.1.19 £	Net movement in funds £	At 31.12.20 £
<b>Unrestricted funds</b>			
General fund	<u>98,485</u>	<u>(40,480)</u>	<u>58,005</u>
	<hr/>	<hr/>	<hr/>
<b>TOTAL FUNDS</b>	<u>98,485</u>	<u>(40,480)</u>	<u>58,005</u>

A current year 12 months and prior year 12 months combined net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	<u>225,618</u>	<u>(266,098)</u>	<u>(40,480)</u>
	<hr/>	<hr/>	<hr/>
<b>TOTAL FUNDS</b>	<u>225,618</u>	<u>(266,098)</u>	<u>(40,480)</u>

Detailed Statement of Financial Activities  
for the Year Ended 31 December 2020

	31.12.20 £	31.12.19 £
<b>INCOME</b>		
<b>Donation income</b>		
Donated general public	12,126	7,291
Donated trading company	<u>78,341</u>	<u>107,110</u>
	90,467	114,401
<b>Activities for generating funds</b>		
Funds generated through sale of advertising	10,597	9,295
<b>Investment income</b>		
Interest receivable	<u>314</u>	<u>544</u>
<b>Total incoming resources</b>	101,378	124,240
<b>EXPENDITURE</b>		
<b>Costs of generating voluntary income</b>		
Paypal charges	-	138
Recharge of wages	<u>-</u>	<u>2,590</u>
	-	2,728
<b>Charitable activities</b>		
Wages	84,147	113,115
Social security	7,309	10,074
Pensions	2,697	2,966
Conference expenses	-	1,254
Postage, packaging and stationery	48	241
Development costs	9,091	11,779
Sysadmin	<u>8,775</u>	<u>4,355</u>
	112,067	143,784
<b>Governance costs</b>		
Paybureau fees	260	265
Insurance	899	942
Telephone	220	237
Advertising	-	74
Travelling and entertainment	210	863
Sundries	35	111
Accountancy and independent examination fees	<u>1,686</u>	<u>1,552</u>
	3,310	4,044
<b>Support costs</b>		

This page does not form part of the statutory financial statements

Free UK Genealogy CIO

Detailed Statement of Financial Activities  
for the Year Ended 31 December 2020

	31.12.20 £	31.12.19 £
<b>Finance</b>		
Bank charges	<u>105</u>	<u>60</u>
<b>Total resources expended</b>	115,482	150,616
	<hr/>	<hr/>
<b>Net expenditure</b>	<u>(14,104)</u>	<u>(26,376)</u>

This page does not form part of the statutory financial statements