



BRITISH ARACHNOLOGICAL SOCIETY

**TRUSTEES ANNUAL REPORT AND
FINANCIAL STATEMENTS**

31 December 2022

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LEGAL AND ADMINISTRATIVE DETAILS

Trustees

L. Andrews
J. Beccaloni
E. L. Bee
T. J. Berry⁴
C. Budworth
R. J. Burkmar¹
R. J. G. Dawson²
L. Fitzpatrick
R. C. Gallon³
A. H. Lavery²
P. Lee⁴
G. S. Oxford
W. J. Parker³
J. Pewtress
M. Reeve¹
P. A. Selden
D. Sherwood³
M. Skinner
M. H. Smith³

Retiring Trustees

¹Retired prior to the AGM in 2022. ²Retired by rotation at the AGM on 24 June 2022. ³Retired by rotation at the AGM on 24 June 2022 and immediately re-appointed.

New Trustees

⁴Appointed at the AGM on 24 June 2022

Principal Office

519 Huntington Road, York, YO32 9PY

Charity Registration Number

1185594

Scottish Charity Number

SC050006

Bankers

Santander UK PLC, Bridle Road, Bootle, Merseyside, L30 4GB
PayPal (UK) Ltd., Whittaker House, 2 Whittaker Ave, Richmond TW9 1EN

REVIEW OF THE SOCIETY'S ACTIVITIES DURING 2022

The BAS has always been an entirely voluntary organisation. Trustees are not remunerated, and the Society has no paid employees. Everything that it achieves is therefore dependent on the skills, hard work and dedication of volunteers. To all of them, Council remains extremely grateful.

Major events of the year (more details below) include:

- the publication of a special issue of our journal, *Arachnology*, containing papers from the successful online Murphy-Roberts Memorial Symposium held December 2021.
- the introduction of an additional membership category with BAS publications accessible online only.
- the receipt of a major legacy, which required reassessment of BAS aims and development of a new five-year strategy.

Publications

During the year, the Society published Parts 1-3 of Volume 19 of its international, scientific journal *Arachnology*, comprising some 680 pages. The number of pages in each issue of *Arachnology* continues to rise, reflecting an increasing interest in publishing in this journal. The Society receives significant remuneration from our agreement signed with BioOne in 2013, which provides on-line access to *Arachnology* to a worldwide audience of subscribing users and libraries.

A special issue of *Arachnology* (Vol. 19), issued in June 2022, contained the proceedings of a symposium held at the end of 2021 to commemorate the lives and worked of two prominent British arachnologists, John Murphy and Dr Mike Roberts. The volume covered a wide sweep of topics and comprised 24 papers (384 pages in total). Two papers considered the contributions of women to arachnology and were dedicated to Frances Murphy, John's wife and fellow arachnologist. A hard copy of this issue was sent to all BAS members. Recordings of the presentations are available on our YouTube channel and all papers are freely available *via* our website.

Numbers 153–155 of the *Newsletter of the British Arachnological Society*, containing numbers 102–104 of *Recording Scheme News*, were published during the year and together totalled 64 pages.

Six more factsheets (nos. 13 to 17) in our popular series were published online during 2022. These factsheets are particularly helpful when responding to arachnid identification requests submitted *via* email or Twitter.

Website

The BAS website continues to be well used by the public and by our members, 312 of whom are now registered on the site. Many additions were made to the site's content this year, including updated access to our new factsheets and YouTube videos, and to our Murphy Roberts symposium papers and live recordings.

Library

Since the 2022 AGM we are without a Librarian. A thorough review of the function and scope of the library is underway, given that much arachnological literature is now freely available online and the library is currently underused.

Recording and monitoring

The Society runs the national Spider Recording Scheme (SRS) and Harvestman Recording Scheme (HRS), and supports the Pseudoscorpion Recording Scheme (PRS).

The SRS currently holds almost 1,250,000 records, an increase of some 20,500 records since Richard Gallon took over administration of the scheme early this year. We continue to receive records from recorders across the UK *via* MapMate, spreadsheets or as *ad hoc* records e-mailed to the scheme. The SRS has also provided identification and record verification support to its recorders throughout the year. We are, additionally, embarking on the task of verifying spider records submitted to iRecord.

This year the HRS focused on delivering workshops and courses relating to identifying harvestmen in the field and with microscopes. During the year, seven courses and field days were delivered, encompassing specimen identification and finding harvestmen on local nature reserves. Recorders were encouraged to submit their own records and these were verified *via* iRecord and direct communication. Additional videos were added to the BAS YouTube channel and any notable observations were reported in the BAS Newsletter.

The PRS has had a few records and enquiries coming in, and Liam Andrews' Pseudoscorpion Facebook page has received a steady input, with about 75 recorders submitting sightings, observation, videos and requests for information, including some from abroad.

Species of conservation concern

The high level of activity of key recorders across the country this year has made an important contribution to arachnid conservation. The data they collect hugely improves our understanding of the status of many of our rarest species and contributes to our ability to provide the accurate assessments of conservation and rarity status that underpin conservation legislation, Red Lists, Action Plans and practical delivery.

We still await the publication by government of the list of spiders included on Schedule 5 list of the Wildlife and Countryside Act 1981 following the 2021 quinquennial review, to which we contributed evidence. The outcome will influence our future conservation, survey, and monitoring work.

In addition to survey work, we continue to contribute expertise to multi-partner conservation initiatives for three Red Listed species: the Diamond-backed Spider *Thanatus formicinus*, the Fen Raft Spider *Dolomedes plantarius* and the Ladybird Spider *Eresus sandaliatus*. The threat to the Critically Endangered Distinguished Jumping Spider *Attulus distinguendus* posed by the London Resort development application mentioned in our report last year, was lessened by withdrawal of the proposal by the developers. It is, however, expected to resurface in a reduced form in 2023.

Membership

At the end of 2022, the membership of the Society stood at 641, which includes three Complimentary Members and nine Honorary Members; all current honorary members are located in the UK. This is a small reduction on the membership total at the end of 2021 but given the current political and economic woes, is not altogether surprising.

The Society's total membership is made up of 533 UK members (552 in 2021) and 108 elsewhere (113 in 2021); the UK total includes three new Digital Members, the first to take advantage of the new membership category that was introduced in late autumn (see below).

Membership recruitment was almost the same as in 2021, with 62 new members joining the Society during the year; of these, all but two were in the UK. As the Society did not attend the Global Bird Fair at Rutland Water or the AES Exhibition at Kempton Park in 2022, almost all of these will have been recruited *via* social media, local events and training activities run by BAS representatives, or word of mouth. This demonstrates that the public are keen to learn more about spiders and other arachnids and are being persuaded to join us as a result of local ambassadors, our web presence and our communications through social media.

The new Digital Membership category was introduced late in the year following approval by the membership at the AGM, and so the membership renewal process early in 2023 will be the first opportunity that existing members will have to switch to the online option, if desired. Early indications from those members with a recurring payment mandate suggest that between 20-25% of existing members will move to the digital option.

Society activities and outputs

The Society's AGM was, held *via* Zoom on 24 June 2022 and attracted 32 members, including one from overseas. In addition to the formal meeting, those attending heard three excellent presentations on spiders by Danni Sherwood, Chris Cathrine and new Trustee, Tylan Berry. Council has agreed to retaining this formula for future AGMs, avoiding the expenditure of time and money to attend in person and thus widening access to our members worldwide.

Our annual field weekend, organised by former Trustee, Francis Farr-Cox, was based at Brent Knoll, Somerset (27th-29th May). In total, 27 people attended the weekend, for all or some of the time. Talks were given on rare spiders and harvestmen in the Plymouth area (John Walters) and on the habitats and management of some of the arranged field sites (Alys Laver & Phil Thorpe). During the weekend, a beginners spider identification workshop was attended by seven people.

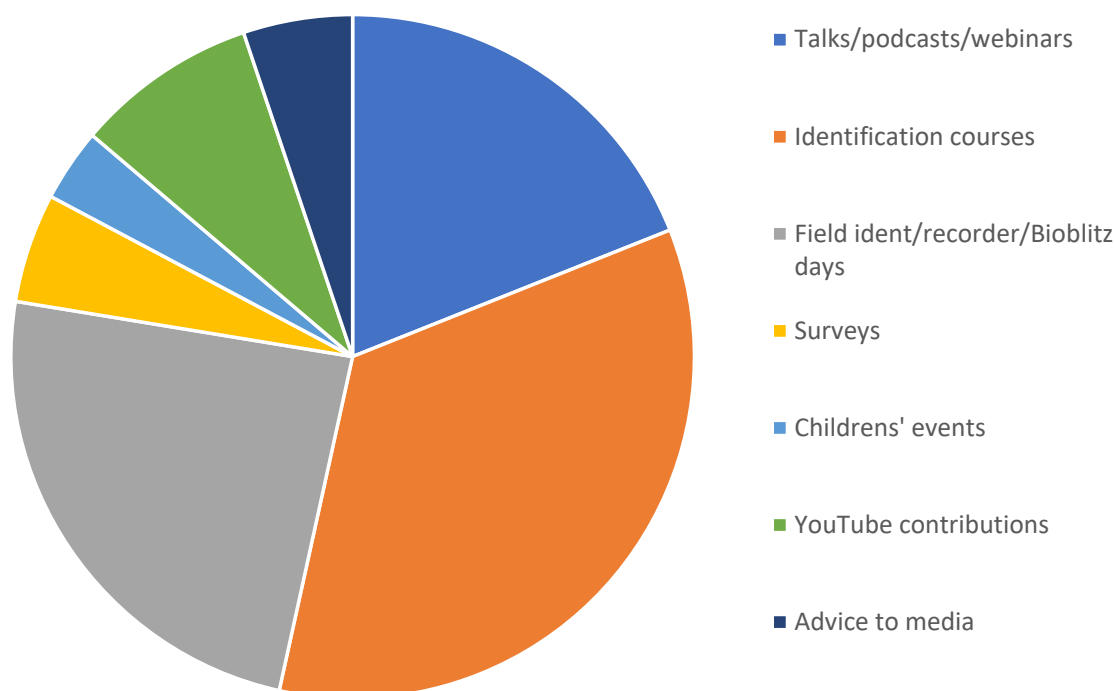
During the year, Francis Farr-Cox has continued to produce identification guides to species new to Britain since the seminal work *Spiders of Great Britain and Ireland* by Mike Roberts was published (1985-1987). These are freely available online (<https://britishspiders.org.uk/spiders-not-in-roberts>) and are designed to be printed out and inserted into the hardback volumes.

Our social media presence continues to play an important role in raising the profile of the Society. It is the main plank of our outreach capacity for all aspects of arachnology – we remain very grateful to all those contributing time and expertise to our website, Twitter and YouTube accounts. Our Twitter following grew to over 11,000 during the year but we suffered a net loss of around 500 as people moved to other platforms following Elon Musk's take-over of the platform. We keep our Twitter presence under review and have contingency plans in place in the event of a failure of the platform. During the year, we expanded our social media offering by launching a BAS YouTube channel featuring a growing number of videos on a wide range of arachnological topics (youtube.com/c/BritishArachnologicalSociety).

Our work to engage children continued *via* our involvement with the magazine of the Bug Club, the junior wing of the Amateur Entomological Society; during 2022, a number of arachnological articles was published. These articles are all freely available on 'Cobweb Corner', the page for younger people on our website.

The Society's voluntary network of Mentors and Regional Coordinators has continued its important role. Mentors offer practical advice to new members who request guidance with identification etc. and Regional Coordinators organise regional public events, often in collaboration with other

organisations. In addition, other members of Council have contributed to the Society's outreach during the year. These activities included, *inter alia*, talks to the public, events for children, identification workshops, production of webinars and YouTube content, podcasts, solicited articles, field days and participation in Bioblitz days (illustrated below).



In all, at least 58 activities with some public interactions were facilitated.

As in previous years, we published our triannual wildlife report columns on British arachnids in the well-respected journal *British Wildlife*. These columns promote the Society and arachnology among both amateur naturalists and conservation professionals.

Grants awarded

One application was received during 2022 from an extremely well qualified Masters student wishing to attend an international field techniques and identification workshop in Greece during 2023. Attending this course will undoubtedly help her ambition to pursue a doctorate in arachnology. A sum of £1000 was granted to pay for the course fee and provide a contribution towards her travel costs.

Legacy

As mentioned above, a major influence on the Society during the year was the receipt of a substantial legacy. This legacy, from the estate of the late John Murphy, was expected but the magnitude was not (£300,000). The Society engaged Susan Hughes (Susan Hughes Consultancy Ltd), who has advised many environmental charities on financial matters, to look at the BAS's operation

and suggest how we could best use this money to pursue our aims and ambitions. After consultation with the Society's Strategy Sub-committee, she produced a report which was considered at a face-to-face meeting between Susan and the full BAS Council, held in Oxford on 8th-9th October. Priorities were suggested for future developments (see below).

FUTURE DEVELOPMENTS

The main activities for 2023 and beyond relate to the development of our strategy in the wake of the Murphy legacy. It is recognized that the Society needs a year to work on and finalise its strategy, but three broad areas have been identified for action during 2023 *viz.* understanding our current membership, reviewing the future of all aspects of the recording schemes, and refocussing the content and updating the look of the Newsletter. Working groups have been set up to progress each of these areas and report back to Council.

Factsheets

With the re-establishment of more face-to-face public events, the new batch of factsheets will be printed as hard copies early in 2023.

Noble False Widow Spider

A *British Wildlife* article is in preparation by past President Alastair Lavery, President Lawrence Bee and trustee Leah Fitzpatrick on the topical issue of False widow spiders and their medical importance.

Species accounts

Recording the changing distributions of all the arachnid groups covered by the Society, and informing the conservation of our rarest species, will continue to be at the forefront of BAS activities. An ongoing aspiration is to complete the major task of updating the species accounts for spiders on the SRS website. Although phenology and distributional data are refreshed frequently, the original species accounts now lag. Like all our work, this major undertaking relies on the time and effort of volunteers. It will form part of an updating of the Scheme's website resulting from the legacy review (above).

SERIOUS INCIDENT REPORTS

No serious incidents took place during the period covered by this report.

MANAGEMENT OF RISK

The Society discussed and updated its *Risk Review* at the autumn Council meeting in 2022.

PUBLIC BENEFIT

The Trustees confirm that they have complied with their duty to have due regard to the Charity Commission's public benefit guidance when planning and managing the Society's resources during the year.

REVIEW OF FINANCIAL ACTIVITY

The results for the year are set out in the following Statement of Financial Activity and Balance Sheet, with accompanying notes.

In summary, Income across all funds amounted to £340,048 and Expenditure £53,126 giving an overall Surplus of £286,922. The finances of the society received a boost this year with the £300,000 from the John Murphy legacy and, as stated above, plans for the next few years will decide how we spend/invest the money. The money is currently in our General Fund deposit account. As ever, our biggest outlay was for publications. As well as the one-off special issue for the Murphy-Roberts Symposium (above) presentations there was a payment for the 'Autumn' 2021 publications that were delayed in distribution. Consultancy fee and Legacy Meeting payments were additional to our usual expenditure, arising from the Murphy legacy. We continued our yearly donation to the World Spider Catalogue and our payment for Manuscript Manager (when authors submit a manuscript to our journal *Arachnology*, it is dealt with online through this system), when necessary. Our primary income came from subscriptions and royalty payments from BioOne and from Princeton University Press (for *Britain's Spiders*). Interest on our legacy will add to our yearly income. We continue to maintain a two-year reserves policy to cover unforeseen issues with income.

Membership Subscription rates continue to cover the Society's running costs for the year, excluding publication costs, but including direct membership costs. We continue to encourage Direct Debit payments for subscriptions.

Reserves Policy

The Society has again carried out its annual review of its Reserves Policy in line with Charity Commission Guidelines and is continuing with the process, begun in 2015, of bringing the structure and designations on all unrestricted funds more up to date with the Society's needs.

The General Fund is an unrestricted and undesignated fund which covers the normal running of the Society including the publishing and despatching of its triannual Journal and Newsletter. The fund is largely generated through member's subscriptions and publication royalties with occasional legacy income. Council still considers it prudent to maintain the reserve on this fund equivalent to two years expenditure on the membership publications and administration overheads.

The Conservation and Research Fund is an unrestricted designated fund created to provide grants to members for survey, recording and conservation work.

The Special Purposes Fund is an unrestricted designated fund and is intended for purposes other than the normal running of the Society, particularly *ad hoc* publications.

The Ted Locket Fund is the only restricted fund held by the Society. Its purpose is to assist members with arachnological fieldwork, attendance at conferences and participation in arachnological field studies courses.

The Trustees will continue to review the Society's reserves and policy annually.

Investment Policy

The Society has continued with its policy to invest funds with the COIF Charity Deposit Fund established by the Charity Commission for England and Wales under Section 25 of the Charities Act 1993 (amended Charities Act 2011). It is considered to provide a good rate of return for the low level of risk. The Trustees review this policy on an annual basis.

Grants Policy

The Society has continued with its grants policy awarding grants within the terms of the appropriate designations and restrictions on the various funds.

Risk Management

The Trustees are responsible for overseeing the risks faced by the Society. They maintain, and review annually, a Risk Register, considering risks to financial sustainability, reputation, legal/insurance liability, and strategic objectives, and developing mitigation strategies for all major risks.

Signed on behalf of the Trustees on 29 April 2023



Lawrence Bee
President and Trustee



Dr Geoff Oxford
Hon Secretary and Trustee

INDEPENDENT EXAMINER'S REPORT

Accounts for the year ended 31 December 2022. The Society's constitution requires that the annual Accounts are subject to independent examination.

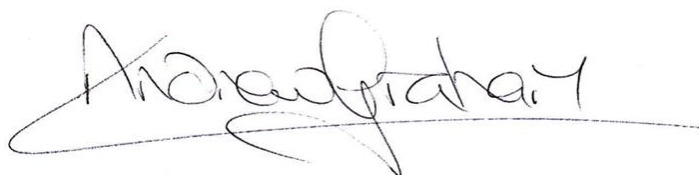
My examination of the Accounts on pages 12 to 17 was carried out in accordance with general directions given by the Charity Commission and is in accordance with Regulation 11 of the Charities Accounts (Scotland) Regulations 2006. An examination includes a review of the accounting records kept by the 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 seeking 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 no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

In connection with my examination, no matter has come to my attention:

(1) which gives me reasonable cause to believe that in any material respect the requirements:

- to keep accounting records in accordance with section 130 of the Charities Act 2011 and section 44(1)(a) of the Charities and Trustee Investment (Scotland) Act 2005 and Regulation 4 of the Charities Accounts (Scotland) Regulations 2006, and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act 2011 and section 11(1)(b) of the Charities and Trustee Investment (Scotland) Act 2005 and Regulation 8 of the Charities Accounts (Scotland) Regulations 2006
- have not been met; or

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

A handwritten signature in black ink, appearing to read 'Andrew Graham', with a long horizontal line extending from the end of the signature.

Andrew Graham
Graham & Co
Accountants
24 Howe End
Kirkbymoorside
YORK
YO62 6DQ

STATEMENT OF FINANCIAL ACTIVITIES

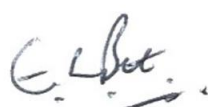
		Year ended 31 December 2022			31 December
		Unrestricted	Restricted	Total	2021
		Funds	Funds	Funds	
		£	£	£	£
Incoming resources	Note				
Voluntary income					
Subscriptions	4	17482		17482	13384
Donations		1301		1301	1356
John Murphy (Legacy)		300000		300000	0
Charitable Activities					
Field weekend		2256		2256	4155
Fund raising	5	16354		16354	11881
Investment income					
Interest received		2594	48	2642	7
Pay Pal Fees		13		13	10
Total incoming resources		340000	48	340048	30793
Resources expended					
Charitable activities					
Publications	6	39482		39482	20717
Field weekend		2217		2217	3830
Events and promotions		0			0
Support Costs		9876		9876	2819
Depreciation		16		16	18
Bank Charges		50		50	25
Fundraising costs					
Consultancy Fees		1485		1485	224
Total resources expended		53126		53126	27409
Net incoming/(outgoing) resources		286922			3384
Total funds brought forward		61408			58024
Total funds carried forward		348330			61408

STATEMENT OF FINANCIAL ACTIVITIES (CONT.)

	Note	2022			2021
		Unrestricted Funds	Restricted Funds	Total Funds	
		£	£	£	£
Fixed assets					
Tangible assets	7	88		88	104
Total fixed assets		88		88	104
Current assets					
Stock of publications		1500		1500	1748
Debtors	8				0
Cash at bank and in hand		350686	4972	355658	70823
Total current assets		352186	4972	357158	72571
Creditors: amounts falling due within one year	9	8916		8916	11267
Net current assets		343270	4972	348242	61304
Net assets		63832	4972	348330	61408
Funds of the charity					
Unrestricted funds					
Special purposes Fund		8957		8957	8870
Conservation and Research Fund		3792		3792	3755
General Fund		337937		337937	53274
		350686		350686	65899
Restricted funds					
Ted Locket Memorial Fund			4972	4972	4924
Total funds		350686	4972	355658	70823

The Notes to the accounts on pages 15 to 17 form part of these financial statements.

Approved by the Trustees on 29th April 2023 and signed on their behalf by:



Lawrence Bee
President and Trustee



James Pewtress
Honorary Treasurer and Trustee

BALANCE SHEET 31 DECEMBER 2022

	2022		2021	
<u>Fixed Assets</u>				
	104		122	
Depreciation	<u>16</u>	88	<u>18</u>	104
<u>Current Assets</u>				
General Account	332539		30068	
Special Purpose Fund	8957		8870	
Conservation Fund	3792		3755	
Ted Locket Memorial	4972		4924	
Santander	5026		23065	
PayPal	372		141	
Stock	<u>1500</u>	<u>357158</u>	<u>1748</u>	<u>72571</u>
		357246		72675
Creditors		<u>8916</u>		<u>11267</u>
Net Assets		<u>348330</u>		<u>61408</u>
<u>Represented by</u>				
Brought forward		61408		58024
Surplus/Deficit for the year		<u>286922</u>		<u>3384</u>
Total Funds		<u>348330</u>		<u>61408</u>

NOTES TO THE ACCOUNTS

- 1 Basis of preparation
- 1.1 Basis of accounting

These accounts have been prepared on the basis of historic cost and in accordance with:

 - the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their Accounts in accordance with FRS 102
 - the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102)
 - the Charities Act, the Charities and Trustee Investment (Scotland) Act 2005 and The Charities Accounts (Scotland) Regulations 2006 (as amended)
- 1.2 The Society constitutes a public benefit entity as defined by FRS 102
- 1.3 The Trustees consider that there are no material uncertainties about the Society's ability to continue as a going concern
- 1.4 No restatement of prior years' accounts were required as a result of applying FRS 102 and the Charities SORP FRS 102

2 Accounting policies

INCOMING RESOURCES

Recognition of incoming resources

These are included in the Statement of Financial Activities (SoFA) when:

- the charity becomes entitled to the resources,
- the trustees are virtually certain they will receive the resources, and
- the monetary value can be measured with sufficient reliability.

Incoming resources with related expenditure

Where incoming resources have related expenditure the incoming resources and related expenditure are reported gross in the SoFA.

Grants and consultancy fees

Grants and consultancy fees are only included in the SoFA when the charity has unconditional entitlement to the resources.

Contractual income and performance related grants

This is only included in the SoFA once the related goods or services have been delivered.

Gifts in kind

Gifts in kind for sale or distribution are included in the accounts as gifts only when sold or distributed by the charity.

Volunteer help

The value of volunteer help received is not included in the accounts but is described in the trustees' annual report.

EXPENDITURE AND LIABILITIES

Liability recognition

Liabilities are recognised as soon as there is a legal or constructive obligation committing the charity to pay out resources.

Irrecoverable VAT

Irrecoverable VAT is charged against the expenditure heading for which it was incurred.

NOTES TO THE ACCOUNTS (CONT.)

2(cont'd) ASSETS

Tangible fixed assets for use by the charity

These are capitalised if they can be used for more than one year. They are valued at cost.

Depreciation is calculated to write down the cost in equal instalments over the expected useful life of the asset at the following rates:

Equipment – 25% or 33% per annum, straight line.

Stock of publications and promotional materials

The cost of publications and promotional material is written off to the SoFA at the time of purchase unless the material remaining at the year-end will have value in future years.

Stock is valued at the lower of cost and net realisable value.

3	Transactions with Trustees		
3.1	Trustees' expenses	2022	2021
	Number of Trustees who were paid expenses	6	7
	Nature of expense:		
	Reimbursement of travel and accommodation expenses	133	0
	Reimbursement of postage	417	134
3.2	Other payments to Trustees		
	Software annual payment	186	0
4	Subscriptions		
	Subscriptions	16139	14458
	Gift Aid	1343	1350
		<u>17482</u>	<u>15808</u>
5	Fundraising		
	Royalties	15749	10117
	Publications	605	1764
	Events	0	0
		<u>16354</u>	<u>11881</u>
6	Publications		
	Members Newsletter and Journal	23648	18958
	Distribution Manager	200	300
	J Wiley & Son	220	0
	Leaflets/FSC Charts	2305	75
	Symposium Publication	13109	0
		<u>39482</u>	<u>18958</u>

NOTES TO THE ACCOUNTS (CONT.)

7	Tangible fixed assets	2022	2021
7.1	Cost	Equipment	Equipment
		£	£
	Balance brought forward	2320	2,320
	Additions		
	Balance carried forward	<u>2320</u>	<u>2,320</u>
7.2	Accumulated depreciation		
	Equipment is depreciated at 15% pa as considered appropriate by the trustees		
		Equipment	Equipment
		£	£
	Balance brought forward	2216	2198
	Charge for the year	16	18
	Balance carried forward	<u>2232</u>	<u>2216</u>
7.3	Net book value		
	Brought forward	<u>104</u>	<u>122</u>
	Carried forward	<u>88</u>	<u>104</u>
8	Debtors and prepayments	Amounts falling due within one year	
		2022	2021
		£	£
	Prepayments and accrued income	0	0
		<u>0</u>	<u>0</u>
9	Creditors and accruals	Amounts falling due within one year	
		2022	2021
		£	£
	<u>Trade creditors</u>		
	Advanced Subs	2157	3178
	Gift Aid	0	1343
	Publications	6543	6542
	Accountant fee	216	204
	Other creditors	0	0
	Accruals and deferred income	0	0
		<u>8916</u>	<u>11267</u>