

Registered Charity
No. 1194496
<https://isdr.org>



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24 September 2023

Annual Report and Accounts for the International Society for Diatom Research

Status as a CIO was granted in May 2022. Since the status was granted, the ISDR are in the process of applying for a new bank account as the new CIO. The ISDR were unable to transfer the existing bank account with Natwest to the new charity and were required to apply for a new account. An application to Natwest bank was rejected in August. A subsequent application to the Co-op was made in September 2022 and this was rejected due to the international make up of the elected Council. A further application will be made to CAFBank in 2023.

As such, no formal activity has taken place as the registered CIO and activity continues under the previous Charity (1054897) for which a return has been submitted. For completeness, the Annual Report of the existing Charity (which will be transferred to the CIO once a banking provider is identified) is attached.

Without a bank account, there are currently no financial statements to be submitted.

The new Charity is expected to be operational sometime in 2024, after which the existing Charity will be closed.

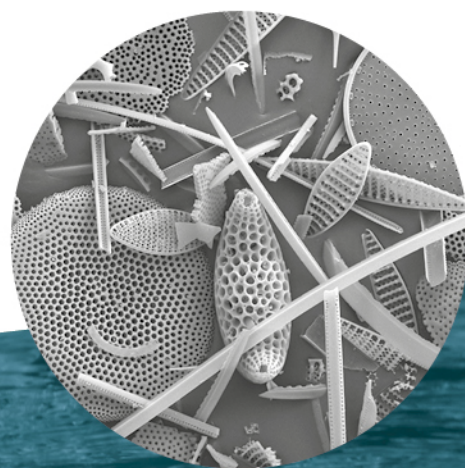
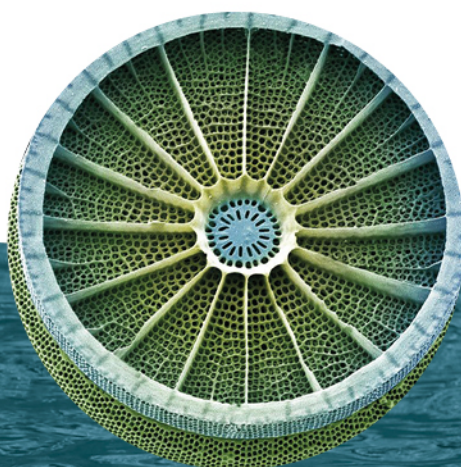
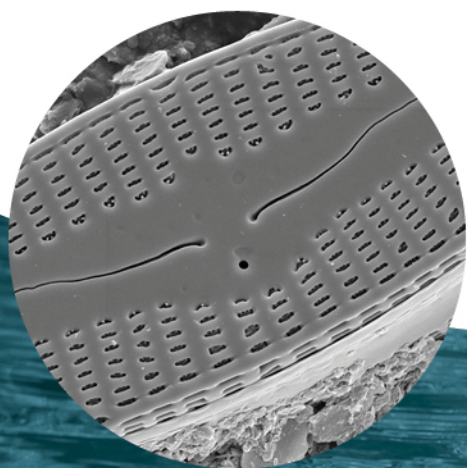
On behalf of the ISDR,

Keely Jones (Mills)

Honorary Treasurer

Annual Report 2022

ISDR Council



Promoting
diatom studies
throughout the world
and facilitating the
exchange of information
between diatom
experts.

I. President's Report

This report has been prepared by Dr Rosa Trobajo.

Reflections 2021-2023

It has been an honour to serve the Society as President for these two years. It has also been quite a lot of work (which I don't regret) as we addressed several issues. First, it may be helpful if I briefly remind members how the ISDR Council works. Since 2020 we have been organised into 4 working groups with the idea of working in parallel on several aspects that we thought important for the Society's present and future. These Working Groups are: (1) Aims of ISDR, (2) ISDR Governance, (3) ISDR Web, and (4) International Diatom Symposia. And more recently, prompted by concerns for the continuity of some historical diatom collections, we added a 5th Working Group on Diatom Collections. Roughly every 2-3 months we have a general Council meeting where we review progress, address various issues that have arisen, make new proposals and vote when necessary. In between Council meetings, urgent issues are dealt by the Executive Committee (President and Vice-President, Secretary and Treasurer).

ISDR Working Groups

The overarching concern we have had is the decline in the Society's membership at least in the last 10 years (see figures in Treasurer's report). This is not restricted to ISDR since other scientific societies have experienced a very similar trend but that doesn't mean we should accept it as inevitable. On the contrary we concluded we needed to take actions to adapt ISDR to the 21st Century. The first step was the establishment of the working groups. Since 2022, to involve as many people as possible in constructing the future of the Society, the Working Groups have been open to any Society member.

The current composition (since 1st February 2023) is:

Working Groups	Main aim	Members of WGs*
Aims of ISDR	To raise the profile of ISDR as a dynamic, supportive scientific society with benefits for all members	Rosa Trobajo (coord.), Andrea Burfeid, Anrich Kock, <i>Becky Bixby</i> , <i>David Williams</i> , Jonas Zimmermann, Marco Cantonati, <i>Paul Hamilton</i> , <i>Shigeki Mayama</i> , Shinya Sato, <i>Xu Chen</i> .
Governance	To keep the ISDR's constitution and associated documentation in line with UK law and promote high standards of behaviour amongst members and officers	Martyn Kelly (coord.), Bart Van der Vijver, Eileen Cox, Ingrid Juettner, Keely Mills,



International Society for Diatom Research

Working Groups	Main aim	Members of WGs*
Web	To create and commission content for the ISDR website https://isdr.org/about/	Sarah Spaulding (coord.), Andrea Burfeid, Anrich Kock, Carlos Wetzel, Ingrid Juettner, Jonas Zimmermann, Keely Mills, Maria Kalhert, <i>Somayyeh Kheiri, Xu Chen.</i>
Future IDS	To establish guidelines for best practices for future IDSs, by gathering learnt experiences from previous IDSs, ideas for special sessions and activities etc.	Jonathan Taylor (coord.), Andrea Burfeid, Anrich Kock, Bart Van de Vijver, <i>Linda Medlin, Mark Edlund, Paul Hamilton, Regine Jahn, Ric Jordan, Rosa Trobajo, Shinya Sato, Xavier Benito.</i>
Diatom Collections	To identify common problems that historical collections are facing & identify opportunities for safeguarding and improving them	Bart Van de Vijver (coord.), Carlos Wetzel, <i>Charlotte Goeyers, David Mann, David Williams, Linda Medlin, Marco Cantonati, Mark Edlund, Paul Hamilton, Regine Jahn, Tanja Schuster.</i>

*Non-Council members of the working groups in italics

Here I would like to thank the coordinators and the working group members, especially the volunteers from outside the Council, for their time and dedication. I hope very much that there will be more and more participation in Working Groups of people from outside Council, since this is a good way to ensure that members' needs and expectations are met and that we all are contributing to the health and growth of the Society. One example of this (among others that I could also mention) is an online discussion series that we will launch this September and this first series will be mainly conducted by David Williams with the help of Becky Bixby, both volunteers from outside Council.

Launch of New Grant Scheme

One thing that I would like to highlight as an achievement of the last two years is the new students and ECRs grant scheme www.isdr.org/about/. This is now open with the deadline of 30th of September for applications and the awards to be announced by end of November 2023. One aim of this scheme (for a trial period of 3 years) is to support students and ECR members of the International Society for Diatom Research (ISDR) to undertake original projects focusing on diatoms (across all disciplines) by providing open funding opportunities and facilitating and promoting collaboration and networking. Another aim, equally important, is to promote a cohort of young members active in the Society and to show how the Society can provide extra benefits to members in addition to our journal and our international diatom symposia. And here I would like to recognise that the new scheme is possible only because of the secure and steady income that our journal generates (see Treasurer's report) and the Society's sound financial management.

Thanks

On behalf of the Council I would very much like to thank Keely Mills (ISDR treasurer) and Ingrid Juettnner (ISDR secretary) for all the hard and continuous work they do for the Society; Eileen Cox (Editor in Chief) for the huge contribution she has made over many years in editing Diatom Research (please notice that IF has increased to 1.8, see Editor's report); and Ric Jordan for organizing this year's IDS in Yamagata when he had already had all the trouble of organizing our first, very successful, online IDS in 2021. I would also like to take this opportunity to thank Andrea Burfeid (ECR representative) and her team, for her belief in the Society, commitment, and hard work.

2. Secretary's Report

This report has been prepared by Dr Ingrid Jüttner.

ISDR Council

Current Council members are:

- Rosa Trobajo (President to become immediate Past President at IDS 2023)
- Sarah Spaulding (Vice-President to become President at IDS 2023)
- Richard Jordan (immediate Past President and Convenor of IDS 2023)
- Eileen Cox (Editor Diatom Research)
- Keely Mills (Treasurer)
- Ingrid Jüttner (Secretary)
- Shinya Sato (Convenor of IDS 2023 / Convenor of immediate past IDS at IDS 2023)
- Jonathan Taylor (to become Convenor of IDS 2025 at IDS 2023)
- Marco Cantonati (elected Trustee)
- Maria Kahlert (elected Trustee)
- Martyn Kelly (elected Trustee)
- Bart Van de Vijver (elected Trustee, to become Vice-President at IDS 2023)
- Carlos E. Wetzel (elected Trustee)
- Jonas Zimmermann (elected Trustee)
- Andrea Burfeid-Castellanos (Early Career Representative)
- Anrich Kock (Early Career Representative)

New Vice-President: Bart Van de Vijver was proposed (unopposed) as candidate.

Annual General Meeting

The last AGM was held online on 17th November 2022, 14.00–15.15 (UTC), and three new Trustees were appointed:

- Marco Cantonati
- Carlos E. Wetzel
- Jonas Zimmermann.

The Minutes will be made available on the ISDR website.

ISDR Membership Fees

The current membership options and rates (currently unchanged) are:

- Standard membership £40 p.a.
- Joint membership £50 p.a.
- Student membership £25 p.a.
- Standard membership (LDC) £20 p.a.
- Student membership (LDC) £10 p.a.

ISDR Council meetings, new student grants

Since the AGM in November 2022 two Council meetings (Zoom) were held on 1st February 2023 and 20th June 2023.

Three online meetings (Zoom) to introduce the two new types of student grants (see President's report and <https://isdr.org/about/>) will be held on:

- 25th July 2023 (Americas)
<https://umn.zoom.us/j/98329532220?pwd=K2RCMkd0Vk9JbWl3MFl5azcyHdEZz09>
- 4th August 2023 (Europe/Asia)
<https://umn.zoom.us/j/98329532220?pwd=K2RCMkd0Vk9JbWl3MFl5azcyHdEZz09>
- 29th August (Asia/Oceania) 2023 <https://uni-due.zoom.us/j/64800722272?pwd=dE4xZHJDZnZnanFSOFdCdm5aTlJTQT09>

Change in legal status of ISDR

After the ISDR Council voted unanimously in 2020 to transfer the Society to a CIO, Julian Lomas, Almond Tree Strategic Consulting Ltd, was appointed to carry out all necessary steps for the transfer of ISDR to CIO. All documents required to transfer to a CIO are in place including a new ISDR Constitution, a new Code of Conduct, the time periods of service for Trustees, and a document outlining the compliance of ISDR procedures with the General Data Protection Regulation (GDPR) legislation. Documents were circulated to the membership in 2021 and three online meetings were held in March 2021 to allow members from different time zones to ask questions about the transition to CIO, two Trustees were present at each meeting. Trustee declarations of agreement for the Society to become a CIO were signed by all Trustees. Julian Lomas submitted the application for CIO to the UK Charity Commission and sent the constitution to Companies House with the request that the name 'Society' can be used for the new CIO. The Charity Commission has approved the registration of ISDR as CIO and Companies House has approved the use of the name 'International Society for Diatom Research' for the new CIO. In August 2021 the Council passed four resolutions to transfer the Society from an Unincorporated Members Association to a Charitable Incorporated Organisation. A Special General Meeting for the membership was convened on 2nd December 2021. 44 members were present, fulfilling the necessary quorum of one tenth of the total membership (225). The resolution to transfer ISDR (an Unincorporated Members Association) to the new ISDR (a Charitable Incorporated Organisation, CIO) was approved (100% yes). The Deeds of Transfer of Charitable Undertaking from unincorporated charity to its incorporated successor was signed by Keely Mills and Ingrid Jüttner in December 2021.

We are applying for a new bank account with the CAF bank, a bank specialising in charities and the only bank that accepts overseas trustees.

The international money transfer policy was approved unanimously by the Council at the Council meeting in June 2023.

Once the new bank account has been opened, the transfer of the assets of ISDR and the agreements with our suppliers including with the publisher of Diatom Research, Taylor & Francis, will be arranged.



IDS Meetings

The 26th IDS is held in Yamagata, Japan, from 28th August-2nd September 2023. You can find out more about the upcoming meeting at <https://diatom.localinfo.jp/>

ISDR website

The ISDR website (www.isdr.org) is supported by our developer: Kevin Cooper - Communications Manager, The Big Idea

3. Aims of the ISDR Report

This report has been prepared by Dr Rosa Trobajo.

Members

- Rosa Trobajo (coordinator)
- Andrea Burfeid
- Anrich Kock
- Becky Bixby
- David Williams
- Jonas Zimmermann
- Marco Cantonati
- Paul Hamilton
- Shigeki Mayama
- Shinya Sato
- Xu Chen

Activities since the last IDS

In the period between the two Annual General Meetings (November 2022 -Sept 2023) we have held two online meetings (on 30th of March 2023 and on 29th of June 2023) and discussed the need for the ISDR to be more active in thinking of and offering benefits for members so that diatomists see the value of joining the Society. Possibilities suggested and discussed included:

- engagement with other scientific societies
- outreach and educational resources
- online courses and lectures
- online workshops on scientific topics
- online discussion series
- online social events (e.g. winter solstice event)

All these were considered viable future activities that would increase the visibility and attractiveness of the Society. We agreed to continue with the Winter Solstice Event as in previous years (hoping there will be enough pairs of hands to organize it).

In September we will launch an (online) discussion series (once a month for 3 seasons) focused on a short presentation (on ideas, concepts etc) and then open discussion (promoting /encouraging debate and participation). They will be open to everyone (not only members). David Williams will be the one in charge at least for the first few sessions with the help of Becky Bixby for moderating discussion and recording the session.

Date for the first session: Wednesday 27th of September at 14.00 UK time. David Williams will introduce/present (virtually) this series at the IDS Yamagata, on Tuesday 29th of August at 18.00-18:30 Tokyo Time (= 11.00-11:30 Paris time). In due course we will send the zoom link for this presentation.

Members: if you have any ideas, suggestions etc, please contact any member of this working group. Also please consider joining us!

4. ISDR Web Team Report

This report was prepared by Dr Sarah Spaulding.

Members

- Sarah Spaulding (US, outgoing team lead)
- Andrea Burfeid-Castellanos (Germany, ECR representative)
- Anrich Kock (South Africa, ECR lead)
- Xu Chen (China)
- Somayyeh Kheiri (Iran)
- Maria Kahlert (Sweden)
- Keely Mills (UK)
- Jonas Zimmerman (Germany)
- Kevin Cooper, (Communications Developer) – contract managed by the Treasurer.

Activities since the last IDS

First, a giant “thank you” to Andrea, who actively updates meetings, opportunities, revives Diatom of the Month, coordinates ECR activities. We appreciate your efforts to make the ISDR website relevant for our community.

We use the free application, BaseCamp, to communicate among our group, track task lists, schedule meetings, and work with Kevin.

The site is now set up to accommodate the ISDR Grants program, with a new tab and the following sub-headings:

- **About** (header image, text to describe the purpose, funding amounts, funding cycle, how applications are scored, other information)
- **How to apply** (text describe the application process, downloadable documents, links)
- **Awards** (blank for now, but will include abstracts of current and past awards)
- **Reports** (blank for now, but will describe accomplishments by awardees, their blogs)

The website is running, and we addressed most of the structure and formatting issues, so our web team set a path to keeping content flowing. We meet every 2-4 months to check in and work on specific topics.

We held a brainstorming session on ideas, goals, and interests related to the ISDR website.

Most important are the questions: *Who is our audience and who do we want to reach through this website? Is it members, other scientists, students, the public, diatomists without access to training and resources? Building membership and serving membership? What is the allocation of content/time/resources to each of these groups?*

Promoting our society and our journal

- Meet the council – maintain council member pages (text and images)

- Question a diatomist.
- Summary of articles from DR – posted several abstracts to highlight research in our journal.

Information

- Let members know about meetings and content by email.
- Brief newsletters to members
- Invite authors to write a short story about their articles.
- Post a discussion forum on the website – we discussed that this is possible to set up but would require a moderator to screen content. If anyone would like to volunteer, let us know.
- Consider having each member of the communication group "adopt" a tab of the website. That person would be responsible for updating and maintaining the tab, as well as passing on information for other updates to the team.
- Xu – posted information on a recent book of diatoms in China.
- Somayyeh – worked on bringing ISDR to the attention of Iranian diatomists and vice versa – bringing ISDR attention to Iranian diatomists. Thank you!

Fun, outreach, informal science topics:

- Human interest article about someone's research.
- Fieldwork gone awry series – everyone has some of these!!
- Annual diatom championship – vote for a favorite
- Weekly clue of mystery diatom

Sharing diatom science:

- Connecting with people through the beauty of diatoms
- Helping people to learn – and to teach – about diatoms.
- How ISDR might be able to support research on diatoms in Iran and other countries?
- Membership can fund activities that could reach people in other countries.
- Book exchanges? Equipment exchanges? Guest lectures? pump-priming funds for local diatom meeting?

As Sarah steps into the role of ISDR President, we need a member of the web team and / or the wider ISDR community to lead the group.

5. Young ISDR Report

This report was prepared by Dr Andrea Burfeid.

Members

Currently: Anrich Kock (incoming Early Career Researcher (ECR) representative), Andrea Burfeid-Castellanos (outgoing ECR representative).

Activities since the last IDS

After Anrich Kock was selected as the new ECR representative, we had an online Q&A session on career opportunities for diatomists with the help of Keely Mills, Roksana Majewska and Ruan Gerber.

We participate in all general ISDR working groups from the ISDR council (Aims of ISDR, Future IDS, ISDR Web group and Diatom collections group) and have advised on the creation of the ECR grant scheme. Andrea Burfeid-Castellanos is currently organizing the ECR activities that will be held in Yamagata at the 2023 IDS: Workshops, ECR Meeting, networking activities and leisure activities.

We currently have a membership of 124 ECR diatomists on our mailing list. The distribution is currently skewed towards Northern and Western countries (Figure 1). As the mailing list applications are set once, the proportion of different states within the academic ranges is not up to date and will be confirmed for the IDS Yamagata.

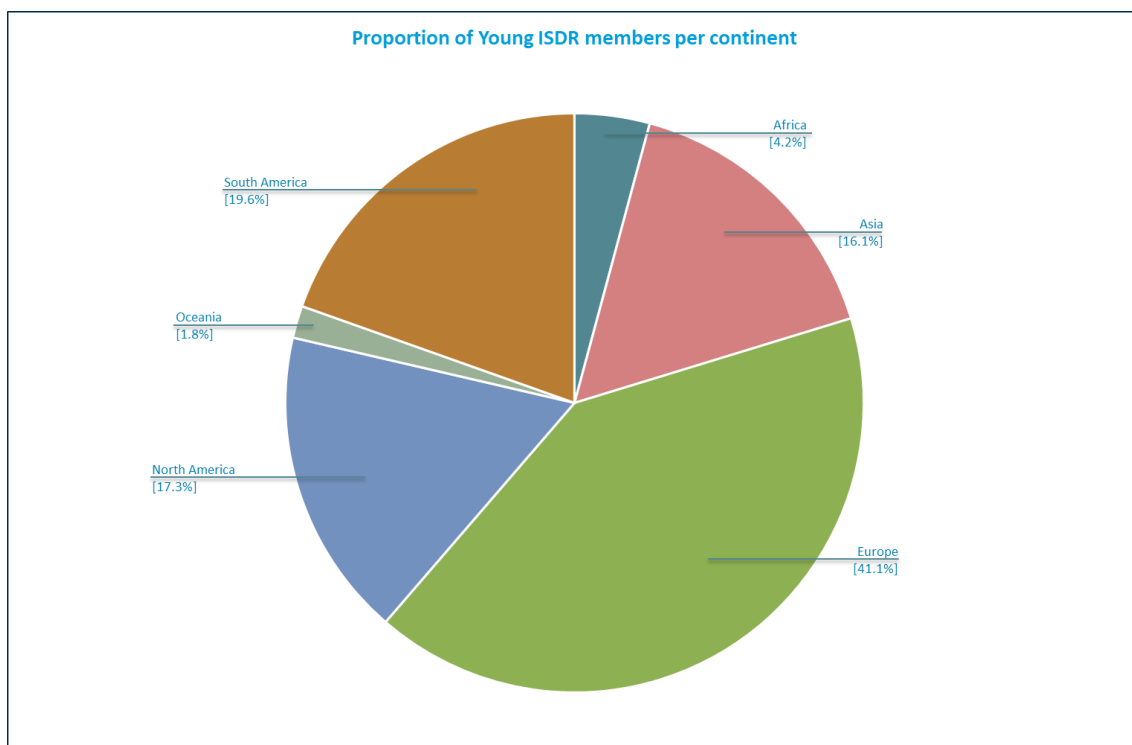


Figure 1: Proportion of Young ISDR members per continent



We are currently managing the generational change of the Diatom of the Month feature, which will be announced soon. The Young ISDR blog has posted seven blogposts since the last IDS. We have many ideas to bring content and networking opportunities but would need volunteers to set them to practice.

We are still looking for volunteers for both ventures, please consider joining us or asking your ECRs to join!

6. Editor-in-Chief Report

This report has been prepared by Dr Eileen J. Cox.

Context

Diatom Research continues to be published by Taylor & Francis and we have a well-established working relationship and continuity of support, despite the inevitable personnel changes within the publishing industry. Having worked for many years with Hennie Thomson as Portfolio manager, she has moved on to another role within Taylor and Francis. Sara Ceci has recently been appointed as her successor and I would anticipate meeting with her before long.

Printed issues are scheduled to appear twice a year (June & December), although there have been some delays in finalising issues. Papers are available online as soon as the proof stage is completed. Based on our contract with Taylor & Francis, we are allowed 500 printed pages per annum, and there is a generous allowance for printed colour figures. We have not yet had any volumes that have reached the annual page limit, although more colour figures have been submitted. However, it is important that colour is only used when necessary. Similarly, supplementary material should be used to accommodate information that is not strictly essential to the paper (e.g., images of taxa found during ecological studies).

The number of papers submitted continues to be below the 2018/19 level (c. 50 per annum), which is rather disappointing although lower numbers of submitted papers has been slightly offset by the receipt of some longer papers.

The record of full downloads from the journal shows an annual figure of 21,000 indicating the interest in the journal. The statistics for submissions are shown in the table below.

Year	2023*	2022	2021
Full paper	14	26	33
Review	-	1	3
Note	2	1	-
Opinion	1	-	-
Conference report	-	-	1
Total	17	28	37
Rejected	41.7%	43.3%	38.7%

**To mid-July*

Whereas most papers go to review, we do also receive submissions that are either inappropriate or far below the journal's standard, which are rejected immediately.



Impact factor

The impact factor for 2022 was 1.8, which is an encouraging improvement compared to 2021, which was 1.386. It is now back to the 2020 value (1.815); impact factors are no longer being given to 3 decimal places.

Submission by country (of lead author)

This shows a good spread of countries, although some countries are less successful at achieving acceptance, or only doing so after extensive revisions.

Year	2023		2022		2021	
	Accept	Reject	Accept	Reject	Accept	Reject
Argentina	0	0	0	0	1	0
Australia	0	0	0	0	1	0
Belgium	0	0	0	0	1	0
China	0	0	2	2	2	2
Denmark	0	0	0	0	1	0
Finland	0	0	0	0	1	0
France	1	0	0	0	2	0
Germany	0	0	2	2	0	0
India	0	2	0	5	0	5
Iran	0	1	1	1	0	3
Italy	0	0	1	0	1	0
Japan	0	0	3	0	1	0
Macedonia	1	0	1	0	0	0
Malaysia	0	0	0	1	0	0
Mexico	0	0	0	0	1	1
Morocco	0	0	0	0	1	0
Poland	2	0	0	0	2	0
Russian Federation	0	0	1	0	1	0

Year	2023		2022		2021	
	Accept	Reject	Accept	Reject	Accept	Reject
Slovakia	0	0	1	0	0	0
South Africa	0	0	0	1	0	0
Spain	0	0	1	0	0	0
Sweden	1	0	0	0	2	0
Thailand	0	0	1	0	0	0
Tunisia	0	0	0	1	0	0
Turkey	1	0	0	2	0	0
United Kingdom	1	0	1	0	3	1
United States of America	1	2	5	1	6	0

Associate editors

Much of the work in assessing papers for publication is undertaken by the Associate editors: Bank Beszteri, Becky Bixby, Andrea Burfeid-Castellanos, Peter Kroth, Patrick Rioual, Koen Sabbe, Shinya Sato, Jeffery Stone, Karthick Balasubramanian, Jonathan Taylor, Diane Winter, and Aleksandra Zgrundo. Several of these have been working for the journal for many years and deserve a break, so offers to help would be much appreciated. As I said last year, I would like to expand the number of Associate editors to reflect the spread of subject matter within the journal and expand the geographic coverage. For example, we do not have any AEs from South America, Australia, or New Zealand. Associate editors are responsible for finding referees and evaluating manuscripts in the light of reviews and their own experience. This is not always an easy job, and all associate editors are to be thanked for their hard work in maintaining the quality of papers in the journal, particularly as some papers go through more than one revision before they are finally accepted. All AEs work hard to improve the quality of the journal and their efforts are much appreciated.

Looking ahead

With respect to the future, I would be happy to receive suggestions for special issues around particular topics / themes, or offers of review papers, especially if these widen the range of papers within the journal. It is a journal for **all** aspects of diatom research, not just systematics and taxonomy. However, any submissions remain subject to our reviewing process, and maintaining scientific rigour remains critical. Potential authors are reminded to check with the journal site before submitting manuscripts, particularly with respect to figure layout and numbering, and to ensure that text, table, and figure files are uploaded separately and in the correct format.

I should also point out that I have now been editing the journal for around 10 years and think it is probably more than time to hand over to someone else! This is obviously a Council decision, but I am sure they would welcome suggestions.

In conclusion, I would like to thank all those who have helped with the journal, either by acting as Associate Editors or reviewers. Without such help editing the journal would be a very onerous task. Thanks are also due to many individuals within Taylor & Francis for their consistently cheerful and constructive assistance.

Finally, I would encourage all ISDR members to submit their best work to Diatom Research and to help raise the quality and profile of the journal.

7. Treasurer' Report

This report was prepared by Dr Keely Mills.

Summary

The financial status of the Society is reported for the year 2022. As in previous years, the Society is holding steady with regards to annual income. The balance at the close of the reporting year (January to December 2022) was £77,339.24, with a Reserve of £5,248.14.

Membership numbers have remained constant since the switch to an automated renewal service in 2020 and are no longer in decline. In 2022, over 170 members used the autorenewal subscription service that we provide through Stripe. Long-term they may be concerns that the Society is not growing, and to maintain future funding initiatives beyond the next 3 years, we would need to steadily increase the number of members of ISDR (Figure 2).

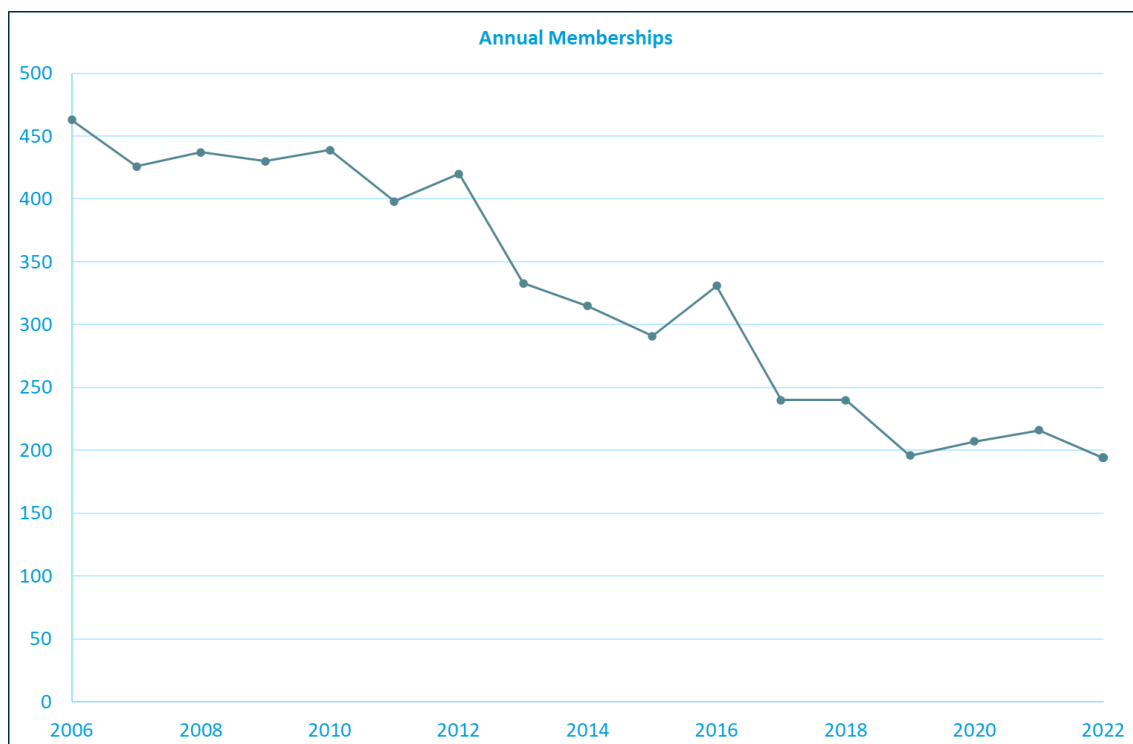


Figure 2: Total membership numbers for the ISDR since 2006.

Assistant Treasurers

As ever, the ISDR would like to extend their sincere thanks to all the Assistant Treasurers: Christine Cocquyt (Belgium), Patrick Rioual (China), and Regine Jahn (Germany).

Membership

The number of Society members as the end of 2022 was 202. This was a small decrease in the number of subscriptions received in 2021 (216). However, 2022 was not an IDS year, and it is not unusual for numbers to be slightly lower in non-IDS years.

Through our auto-renewal system, regardless of when members subscribe, auto-renewal payments are reset so that they are debited on 01 January. This can cause confusion with members who subscribe later in the calendar year, and we take this opportunity to remind members that any subscription is for a calendar year (January-December). This is due to the journal being published annually. We cannot split memberships over 2 journals.

Memberships under the LDC category remain low, and there is a need for the ISDR to engage with potential members in these areas (Figure 3).

Finally, we are still using a mailing client (Mail Chimp) to contact members – it is important to add this email to your “safe senders” list. Key information is disseminated via this channel – including issues with journal subscriptions, reminders regarding the processing of recurring payments, as well as information to how you can suspend these recurring payments – amongst all the other activities of the ISDR and YoungISDR.

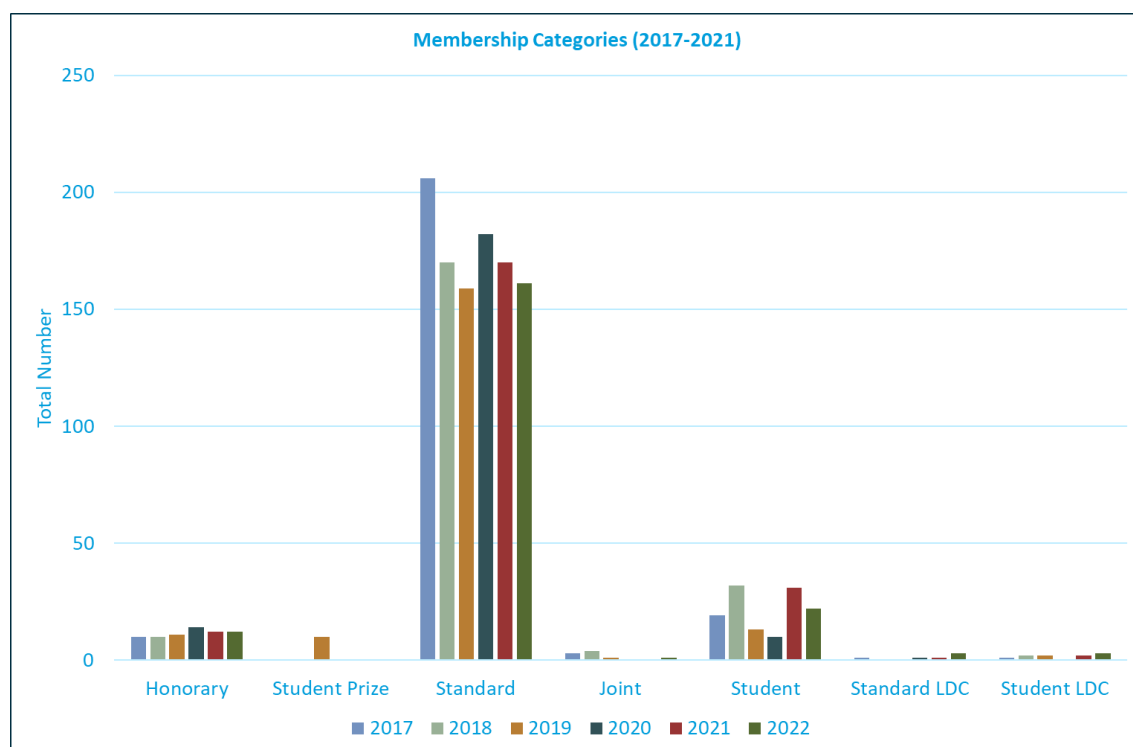


Figure 3: Total membership by ‘type’ for 2017 through to 2021.

Payment methods

We take most of our payments via Stripe. This system offers the Society (a registered charity) better value for money in terms of transactional charges, and they do not charge an

additional fee for using the service. As a result of the auto-renewal system offered by Stripe, in 2022 87% of our transactions were captured this way, the remainder of payments were received via bank transfer or assistant treasurers (Figure 4).

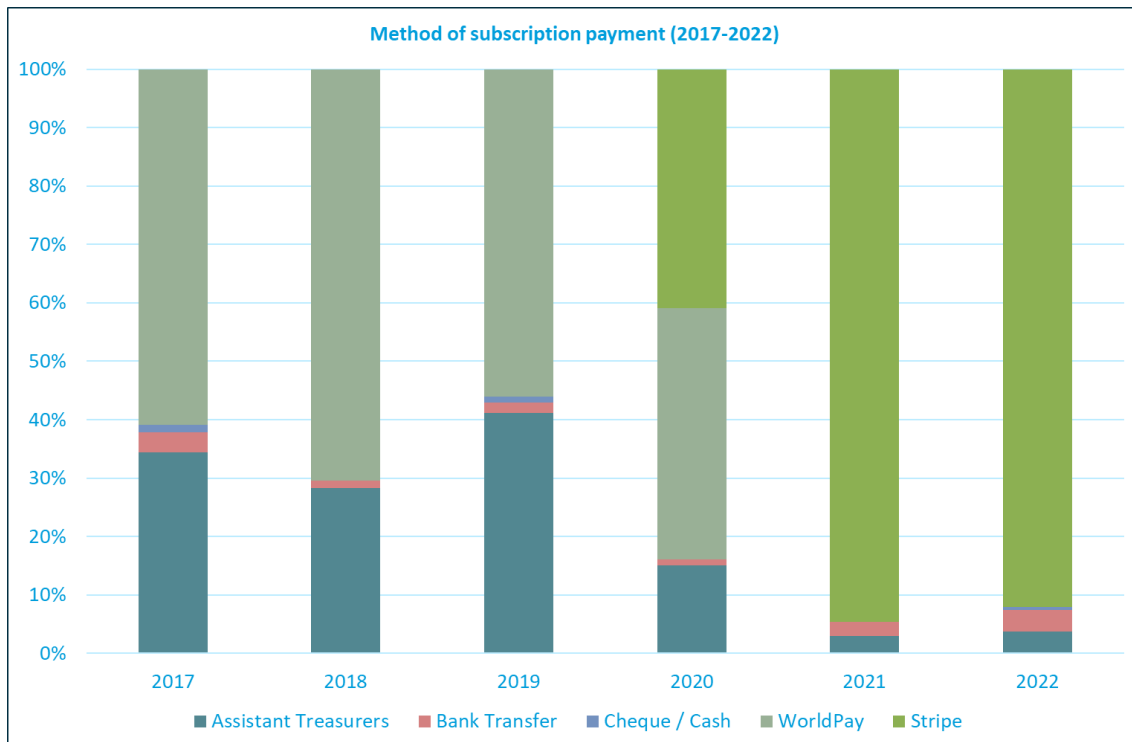


Figure 4: Payment methods to the ISDR since 2017 (as % of total payments).

In advance of each subscription year (usually October/November), subscription rates are recalculated and updated for foreign currency transactions and this information will be updated on our website and a fee notice circulated via Mail Chimp.

In 2023 we regret to inform our membership that we will no longer be able to accept cheques. This is due to the changing nature of the UK banking system and the closure of all local branches. There is no longer an accessible way for the Society to cash cheques. The Society will not accept cash transactions.

Online banking

ISDR use online banking via NatWest. Online bank statements are fully available and are downloaded annually to aid with completing the Charity Commission financial return. Most of the invoicing (e.g., Taylor & Francis, Stripe, Website hosting, Indemnity Insurance) is received electronically, and paid by either direct debit or via online transactions.

As part of the ISDR Governance Review, we will need to move bank providers, and we are in the process of completing a banking application to the CAF bank who will be able to support the Society's needs moving forward.



International Society for Diatom Research

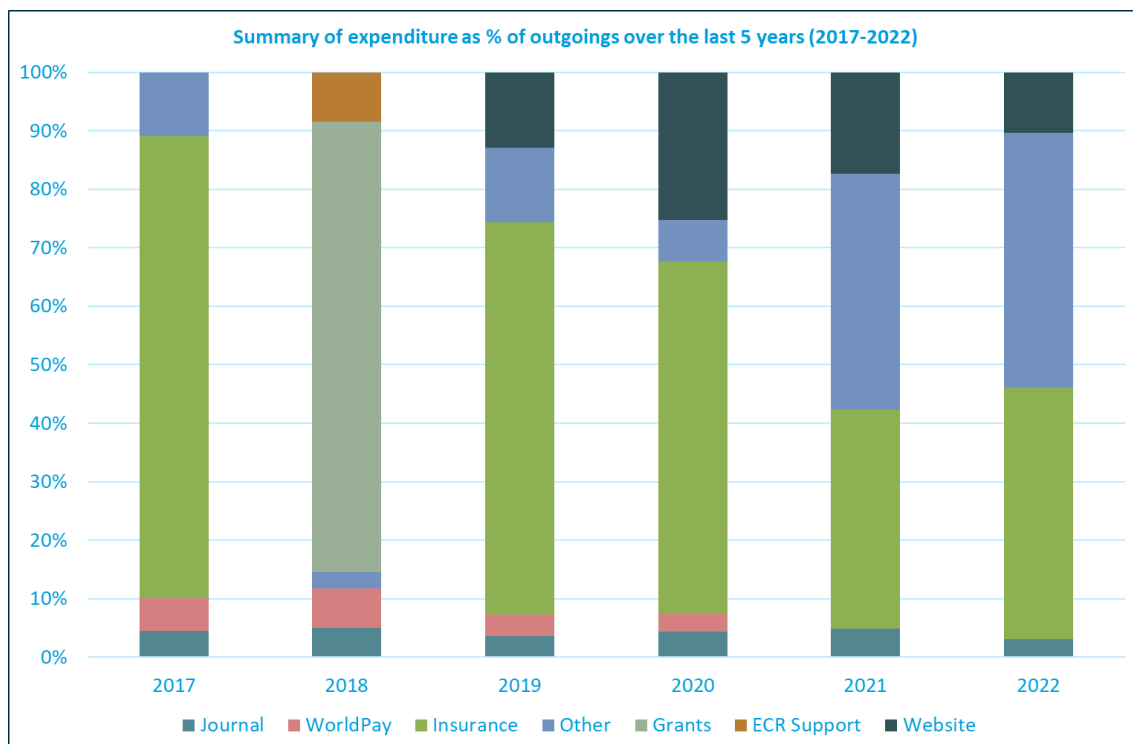
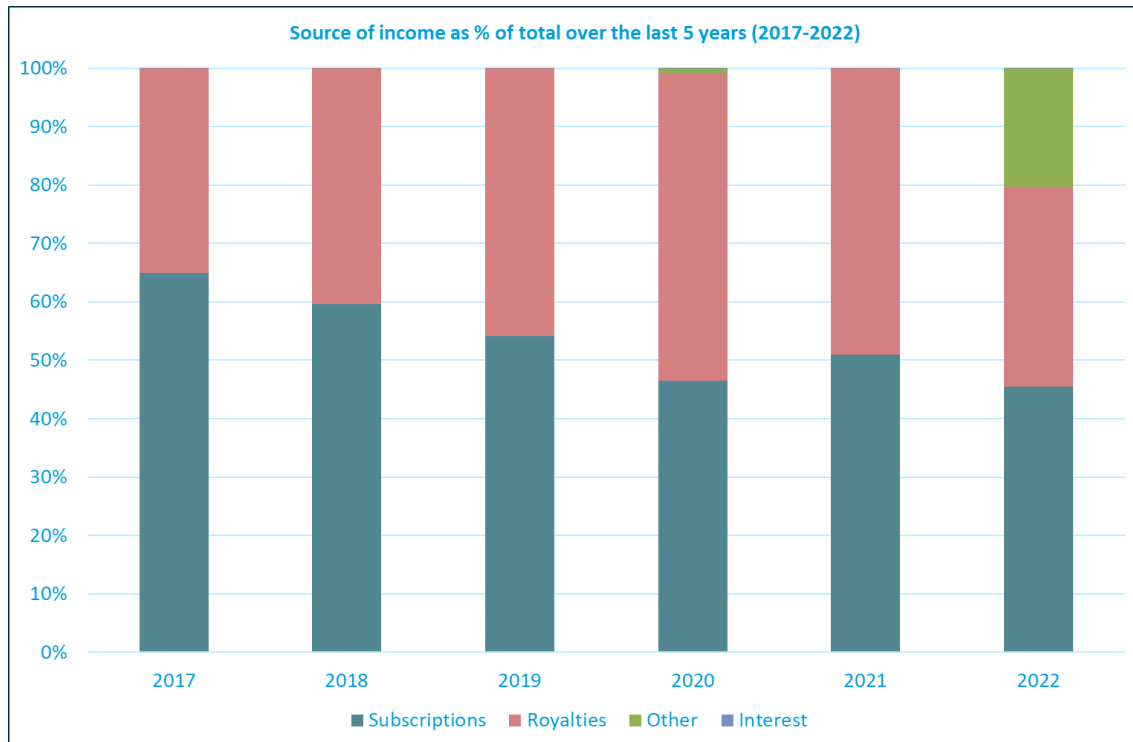


Figure 5: A summary (%) of (top) income by source and (bottom) expenditure (2017-2021).

Financial Status

The opening account balances in 2022 were £5,236.75 in the Capital Reserve Account and £69,293.72 in the Current Account. The ISDR accounts from 2022 are appended to this report.

In 2022 the Capital Reserve Account closed at **£5,248.14**, and the closing balance of the Current Account was **£77,339.24**. The total income in 2022 was £18,098.51. With regards to the income, £8,220.89 was from subscription payments and £6,215.83 from T&F royalties. Outgoing payments (£10,401.60) included liability insurance (£304.61), T&F journal charges (£4,320) and the monthly maintenance costs for the ISDR website (£1,037.99). Other expenses included payments to the Japan hosts for the IDS 2021 virtual meeting (£2027.50), and payments for hiring an HR consultant to help the Society with our governance review (£314).

Charity Commission Return

The Charity Commission Return has been submitted for 2022 (the one-page financial statement is appended to this report). The new rules as outlined by the Charity Commission mean that the Society no longer needs to provide a financial statement, accounts, or an independent audit if our gross income is less than £25,000, and we are well within this limit. For transparency, an independent audit was undertaken in 2018, and we will seek to have our accounts audited in 2023.

Other

Other items to report, and to apologise for, is the remaining problems with issues of Diatom Research. We think we are almost on top of this, but it is important that members contact the Society to inform us of any problems. This is increasingly important as the publisher (Taylor & Francis) only print the copies we need in each calendar year. They no longer produce backstock. As a result, we are no longer able to provide back copies if you have missed a subscription year.

If you wish you secure your hard copy of the journal, it will help the Society immensely if you subscribe no later than June of each year. Your subscription payment is valid for one calendar year – and by this we mean January to December. Therefore, if you subscribe to the Society in November, your subscription is valid for that year – it does not run into the following year. Please help us by making your payments as early as possible or using our recurring payment system via Stripe.

International Society for Diatom Research
Financial Statement for the Period January 1st to December 31st 2022

	£	£
Balances in account - January 1st 2022		
Current Account	69,293.72	
Capital Reserve Account	5,236.75	
TOTAL	74,530.47	

INCOME		
Subscription Payments	8,220.89	
Interest (Capital Reserve)	11.39	
Royalties from Diatom Research (T&F)	6,215.83	
Other	3,650.40	
TOTAL	18,098.51	

(a) Balance Jan 1st + Income (2022)	TOTAL	92,628.98
(b) Expenditure (2022)	TOTAL	10,041.60
(a) - (b) = Balance Dec 31st (2022)		82,587.38

	£	£
EXPENDITURE		
Liability insurance	304.61	
Website Monthly Service Package	1,037.99	
Taylor & Francis Invoice - Diatom Research	4,320.00	
Other	4,379.00	
TOTAL	10,041.60	

Balances in Bank - 31st December 2022		
Current Account	77,339.24	
Capital Reserve Account	5,248.14	
TOTAL	82,587.38	

Cash in hand

Keely Mills
Honorary Treasurer (19-June-2023)

International Society for Diatom Research - Accounts 2022

Payments to and from National Westminster Bank

South Kensington Station Branch, PO Box 592, 18 Cromwell Place, London SW17 2LB

Sort Code: 51-50-01

Charity No: 1054897

IBAN: GB80 NWBK 5150 0106 4339 60

BIC: NWBK GB 2L

ISDR Capital Reserve Statement

Account No: 11130199

<i>Date</i>	<i>Transaction</i>	<i>£ Credit</i>	<i>£ Debit</i>	<i>Balance</i>
	Balance brought forward from 2021			5,236.75
31/01/2022	Interest	0.04		5,236.79
28/02/2022	Interest	0.04		5,236.83
31/03/2022	Interest	0.04		5,236.87
29/04/2022	Interest	0.36		5,237.23
31/05/2022	Interest	0.46		5,237.69
30/06/2022	Interest	0.43		5,238.12
29/07/2022	Interest	0.42		5,238.54
31/08/2022	Interest	0.47		5,239.01
30/09/2022	Interest	0.95		5,239.96
31/10/2022	Interest	1.71		5,241.67
30/11/2022	Interest	3.02		5,244.69
30/12/2022	Interest	3.45		5,248.14
	Closing balance as of 31st December 2022			5,248.14

ISDR Current Account Statement

Account No: 06433960

<i>Date</i>	<i>Transaction</i>	<i>£ Credit</i>	<i>£ Debit</i>	<i>Balance</i>
	Balance brought forward from 2021			69,293.72
04/01/2022	Big Idea Creative - Website Maintenance		85.00	69,208.72
04/01/2022	STRIPE - Membership Subscription Payments	38.64		69,247.36
17/01/2022	STRIPE - Membership Subscription Payments	39.32		69,286.68
20/01/2022	STRIPE - Membership Subscription Payments	38.64		69,325.32
21/01/2022	IDS 2021 - ISDR Support International Transfer [1]		2027.50	67,297.82
24/01/2022	T & F Royalties	2500.00		69,797.82
28/01/2022	Subscription (Personal) - International Bank Transfer	40.00		69,837.82
28/01/2022	STRIPE - Membership Subscription Payments	507.76		70,345.58
31/01/2022	Subscription (Personal) - International Bank Transfer	40.00		70,385.58
31/01/2022	STRIPE - Membership Subscription Payments	2409.83		72,795.41
01/02/2022	Big Idea Creative - Website Maintenance		85.00	72,710.41
01/02/2022	STRIPE - Membership Subscription Payments	179.99		72,890.40
03/02/2022	STRIPE - Membership Subscription Payments	2038.58		74,928.98
07/02/2022	STRIPE - Membership Subscription Payments	78.64		75,007.62
08/02/2022	Subscription (Personal) - International Bank Transfer	25.00		75,032.62
09/02/2022	STRIPE - Membership Subscription Payments	48.35		75,080.97
10/02/2022	STRIPE - Membership Subscription Payments	100.67		75,181.64
11/02/2022	STRIPE - Membership Subscription Payments	38.82		75,220.46
11/02/2022	Subscription (Personal) - International Bank Transfer	39.00		75,259.46
16/02/2022	STRIPE - Membership Subscription Payments	77.96		75,337.42
21/02/2022	Big Idea Creative - Domain Renewal Costs		17.99	75,319.43
23/02/2022	T & F Royalties	3715.83		79,035.26
01/03/2022	Big Idea Creative - Website Maintenance		85.00	78,950.26
01/03/2022	STRIPE - Membership Subscription Payments	37.28		78,987.54

01/03/2022 Belgian Treasurer - Subscription	114.50	79,102.04
07/03/2022 STRIPE - Membership Subscription Payments	78.64	79,180.68
15/03/2022 German Treasurer - Subscription	84.57	79,265.25
29/03/2022 IDS 2021 - ISDR Support International Transfer - Failed - Refunded Payment [1]	1774.53	81,039.78
01/04/2022 Big Idea Creative - Website Maintenance	85.00	80,954.78
19/04/2022 STRIPE - Membership Subscription Payments	38.64	80,993.42
20/04/2022 STRIPE - Membership Subscription Payments	39.32	81,032.74
28/04/2022 STRIPE - Membership Subscription Payments	24.07	81,056.81
29/04/2022 STRIPE - Membership Subscription Payments	38.64	81,095.45
03/05/2022 Big Idea Creative - Website Maintenance	85.00	81,010.45
04/05/2022 Subscription (Personal) - International Bank Transfer	40.00	81,050.45
17/05/2022 HR Consultant - Code of Conduct & Administrative Advice	216.00	80,834.45
24/05/2022 Cheque Deposit - Offline STRIPE Subscription Payment & Subscription (Personal)	1380.97	82,215.42
01/06/2022 Big Idea Creative - Website Maintenance	85.00	82,130.42
13/06/2022 IDS 2021 - ISDR Support International Transfer [2]	2027.50	80,102.92
14/06/2022 STRIPE - Membership Subscription Payments	39.32	80,142.24
23/06/2022 STRIPE - Membership Subscription Payments	38.64	80,180.88
01/07/2022 Big Idea Creative - Website Maintenance	85.00	80,095.88
05/07/2022 HR Consultant - Code of Conduct & Administrative Advice	108.00	79,987.88
06/07/2022 STRIPE - Membership Subscription Payments	38.64	80,026.52
18/07/2022 Taylor & Francis Invoice - Diatom Research	4320.00	75,706.52
29/07/2022 STRIPE - Membership Subscription Payments	38.64	75,745.16
01/08/2022 Big Idea Creative - Website Maintenance	85.00	75,660.16
17/08/2022 Subscription (Personal) - International Bank Transfer	39.45	75,699.61
22/08/2022 STRIPE - Membership Subscription Payments	24.07	75,723.68
30/08/2022 Subscription (Personal) - International Bank Transfer	25.00	75,748.68
01/09/2022 Big Idea Creative - Website Maintenance	85.00	75,663.68
12/09/2022 STRIPE - Membership Subscription Payments	24.07	75,687.75
03/10/2022 Big Idea Creative - Website Maintenance	85.00	75,602.75
05/10/2022 IDS 2021 - ISDR Support International Transfer - Failed - Refunded Payment [2]	1875.87	77,478.62
13/10/2022 STRIPE - Membership Subscription Payments	38.64	77,517.26
17/10/2022 Liability Insurance (Profile Insurance LTD)	304.61	77,212.65
20/10/2022 STRIPE - Membership Subscription Payments	38.64	77,251.29
01/11/2022 Big Idea Creative - Website Maintenance	85.00	77,166.29
07/11/2022 STRIPE - Membership Subscription Payments	39.32	77,205.61
17/11/2022 STRIPE - Membership Subscription Payments	77.28	77,282.89
01/12/2022 Big Idea Creative - Website Maintenance	85.00	77,197.89
01/12/2022 STRIPE - Membership Subscription Payments	38.64	77,236.53
12/12/2022 STRIPE - Membership Subscription Payments	38.64	77,275.17
13/12/2022 STRIPE - Membership Subscription Payments	24.07	77,299.24
30/12/2022 Subscription (Personal) - Bank Transfer	40.00	77,339.24
Closing balance as of 31st December 2021		77,339.24

INCOME	2022 TOTAL	18,087.12
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Subscription Payments

04/01/2022 STRIPE - Membership Subscription Payments	38.64
17/01/2022 STRIPE - Membership Subscription Payments	39.32
20/01/2022 STRIPE - Membership Subscription Payments	38.64
28/01/2022 STRIPE - Membership Subscription Payments	507.76
28/01/2022 Subscription (Personal) - International Bank Transfer	40.00
31/01/2022 STRIPE - Membership Subscription Payments	2,409.83
31/01/2022 Subscription (Personal) - International Bank Transfer	40.00
01/02/2022 STRIPE - Membership Subscription Payments	179.99
03/02/2022 STRIPE - Membership Subscription Payments	2,038.58

07/02/2022 STRIPE - Membership Subscription Payments	78.64
08/02/2022 Subscription (Personal) - International Bank Transfer	25.00
09/02/2022 STRIPE - Membership Subscription Payments	48.35
10/02/2022 STRIPE - Membership Subscription Payments	100.67
11/02/2022 STRIPE - Membership Subscription Payments	38.82
11/02/2022 Subscription (Personal) - International Bank Transfer	39.00
16/02/2022 STRIPE - Membership Subscription Payments	77.96
01/03/2022 Belgian Treasurer - Subscription	114.50
01/03/2022 STRIPE - Membership Subscription Payments	37.28
07/03/2022 STRIPE - Membership Subscription Payments	78.64
15/03/2022 German Treasurer - Subscription	84.57
19/04/2022 STRIPE - Membership Subscription Payments	38.64
20/04/2022 STRIPE - Membership Subscription Payments	39.32
28/04/2022 STRIPE - Membership Subscription Payments	24.07
29/04/2022 STRIPE - Membership Subscription Payments	38.64
04/05/2022 Subscription (Personal) - International Bank Transfer	40.00
24/05/2022 Cheque Deposit - Offline STRIPE Subscription Payment & Subscription (Personal)	1,380.97
14/06/2022 STRIPE - Membership Subscription Payments	39.32
23/06/2022 STRIPE - Membership Subscription Payments	38.64
06/07/2022 STRIPE - Membership Subscription Payments	38.64
29/07/2022 STRIPE - Membership Subscription Payments	38.64
17/08/2022 Subscription (Personal) - International Bank Transfer	39.45
22/08/2022 STRIPE - Membership Subscription Payments	24.07
30/08/2022 Subscription (Personal) - International Bank Transfer	25.00
12/09/2022 STRIPE - Membership Subscription Payments	24.07
13/10/2022 STRIPE - Membership Subscription Payments	38.64
20/10/2022 STRIPE - Membership Subscription Payments	38.64
07/11/2022 STRIPE - Membership Subscription Payments	39.32
17/11/2022 STRIPE - Membership Subscription Payments	77.28
01/12/2022 STRIPE - Membership Subscription Payments	38.64
12/12/2022 STRIPE - Membership Subscription Payments	38.64
13/12/2022 STRIPE - Membership Subscription Payments	24.07
30/12/2022 Subscription (Personal) - Bank Transfer	40.00

TOTAL	8,220.89
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Interest (to Capital Reserve Account)

31/01/2022 Interest	0.04
28/02/2022 Interest	0.04
31/03/2022 Interest	0.04
29/04/2022 Interest	0.36
31/05/2022 Interest	0.46
30/06/2022 Interest	0.43
29/07/2022 Interest	0.42
31/08/2022 Interest	0.47
30/09/2022 Interest	0.95
31/10/2022 Interest	1.71
30/11/2022 Interest	3.02
30/12/2022 Interest	3.45

TOTAL	11.39
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Royalties

24/01/2022 T & F Royalties	2,500.00
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23/02/2022 T & F Royalties	3,715.83
TOTAL	6,215.83
Other Income (International Payment Refund)	
29/03/2022 IDS 2021 - ISDR Support International Transfer - Failed - Refunded Payment [1]	1,774.53
05/10/2022 IDS 2021 - ISDR Support International Transfer - Failed - Refunded Payment [2]	1,875.87
TOTAL	3,650.40
OUTGOINGS	2022 TOTAL
Liability Insurance	10,041.60
17/10/2022 Liability Insurance (Profile Insurance LTD)	304.61
TOTAL	304.61
Website Administration	
04/01/2022 Big Idea Creative - Website Maintenance	85.00
01/02/2022 Big Idea Creative - Website Maintenance	85.00
21/02/2022 Big Idea Creative - Domain Renewal Costs	17.99
01/03/2022 Big Idea Creative - Website Maintenance	85.00
01/04/2022 Big Idea Creative - Website Maintenance	85.00
03/05/2022 Big Idea Creative - Website Maintenance	85.00
01/06/2022 Big Idea Creative - Website Maintenance	85.00
01/07/2022 Big Idea Creative - Website Maintenance	85.00
01/08/2022 Big Idea Creative - Website Maintenance	85.00
01/09/2022 Big Idea Creative - Website Maintenance	85.00
03/10/2022 Big Idea Creative - Website Maintenance	85.00
01/11/2022 Big Idea Creative - Website Maintenance	85.00
01/12/2022 Big Idea Creative - Website Maintenance	85.00
TOTAL	1,037.99
Taylor & Francis Journal Charges (Diatom Research)	
18/07/2022 Taylor & Francis Invoice - Diatom Research	4,320.00
TOTAL	4,320.00
Other	
21/01/2022 IDS 2021 - ISDR Support International Transfer [1]	2,027.50
17/05/2022 HR Consultant - Code of Conduct & Administrative Advice	216.00
13/06/2022 IDS 2021 - ISDR Support International Transfer [2]	2,027.50
05/07/2022 HR Consultant - Code of Conduct & Administrative Advice	108.00
TOTAL	4,379.00