

THE ORAL HISTORY SOCIETY

England & Wales · Charity number 288805

Details

Status Registered

Legal form Other

Registered 1984-03-05

Register [View on the Charity Commission register](#)

Contact

Address The Old Quarry House
Upper Aston
Montgomery
Powys
SY15 6TA

Phone 01732 824085

Email ohs@ohs.org.uk

Website ohs.org.uk

Activities

Objects: TO ADVANCE THE EDUCATION OF THE PUBLIC IN THE METHODS AND PRACTICE OF ORAL HISTORY IN ALL APPROPRIATE FIELDS AND TO ENCOURAGE THE DISCUSSION OF METHODOLOGY, TECHNICAL PROBLEMS AND ALL RELEVANT MATTERS BY THE PUBLICATION OF A JOURNAL AND BY THE ORGANISATION OF CONFERENCES AND MEETINGS.

Activities: We run training programmes in oral history techniques, run a website, publish a journal, run a regional network, offer advice, run an annual conference, act as a focal point for oral history and deal with ethical issues, archiving and technical developments for dissemination.

Classification

- **How:** Provides Human Resources, Provides Services, Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body
- **What:** General Charitable Purposes, Education/training, Arts/culture/heritage/science, Environment/conservation/heritage
- **Who:** Children/young People, Elderly/old People, People With Disabilities, People Of A Particular Ethnic Or Racial Origin, Other Charities Or Voluntary Bodies, Other Defined Groups, The General Public/mankind

Geography

- Northern Ireland
- Scotland
- Throughout England And Wales

Finances

| Period end | Income | Expenditure | Assets | Employees |
|------------|---------|-------------|--------|-----------|
| 2024-12-31 | £58,596 | £50,772 | - | - |
| 2023-12-31 | £77,690 | £77,108 | - | - |
| 2022-12-31 | £72,515 | £64,546 | - | - |
| 2021-12-31 | £49,247 | £48,923 | - | - |
| 2020-12-31 | £41,320 | £36,368 | - | - |

Trustees

| Name | Role | Appointed |
|--------------------------------------|-------|------------|
| Professor John Gabriel BA PhD | Chair | 2017-07-15 |
| BETH THOMAS | | |
| CYNTHIA BROWN | | |
| DR ROB PERKS | | |
| Dr Alan John Butler | | 2021-07-10 |
| Dr Amy Tooth Murphy | | 2016-07-15 |
| Dr CRAIG TRUMAN FEES | | |
| Dr Cai Morgan Parry Jones | | 2018-01-01 |
| Dr Hiten Mistry | | 2025-07-02 |
| Dr Juanita Anne Cox | | 2022-07-09 |
| Dr ROBERT B PERKS MBE DLitt | | 1986-05-03 |
| JENNY HARDING PHD MSC | | |
| Juliana Dempsey | | 2010-07-02 |
| Mary Stewart | | |
| Mohammed Ijaz Ul-haq Faheem Chishti | | 2022-07-09 |
| Mx Erum Nazeer Dahar | | 2022-07-09 |
| PROFESSOR JOANNA BORNAT | | |
| Padmini Broomfield | | 2008-07-04 |
| VERUSCA CALABRIA | | |

THE ORAL HISTORY SOCIETY

England & Wales - Charity number 288805

Accounts

REGISTERED CHARITY NUMBER: 0288805

**REPORT OF THE TRUSTEES AND
FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2024
FOR
THE ORAL HISTORY SOCIETY**

**Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY**

THE ORAL HISTORY SOCIETY

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THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2024

My report will provide an overview of what has been a successful and productive year for the Society, although it must be seen against a backdrop of cuts to the museums, archives and university sectors causing uncertainty and pressure, not only for those working in those sectors but our freelance colleagues who have also borne the brunt of cost-cutting measures. I'll begin, though, with our own financial position, which is comparatively strong. The Society ended 2024 in a healthy financial position with total reserve funds of over £112.4k compared to £104k at the end of 2023 and with income for the year of £58.6k and expenditure of £50.7k. Much of that surplus, however, can be accounted for as an item of expenditure we planned for 2024 but have deferred until 2025.

Before moving on from our accounts, I would like to pay a special thanks to those who have donated to the OHS Future Fund which now totals in excess of £5k and aims to support our remarkable volunteers to fund training courses, attend conferences and meet others to exchange knowledge, in recognition of their outstanding contribution to the Society. We are expecting to be able to award our first grants quite soon as the Fund grows.

Every year the Society has to demonstrate to our auditors that we are a 'going concern'. This means not only looking at our current financial position but being aware of and addressing risks facing the Society in the future. There are three that we have been addressing with tangible progress in 2024. The first is to mitigate against any reduction in membership as annual subscriptions are our main source of income. The good news is that membership reached a five-year high of 955 in 2024, driven largely by increases in personal memberships both in the UK and abroad. While institutional memberships declined, the rise in individual members marked a shift in membership dynamics. The new rolling membership model has reduced seasonal variation, helping stabilise income throughout the year.

Our strategic review in 2023 prioritised making joining easier and better communicating member benefits. This has been the responsibility of the Membership Review Group and their work has already contributed to a noticeable increase in sign-ups, particularly in autumn 2024. A major strategic shift was the decision to bring membership management in-house. Although the Society had a long-standing partnership with Webscribe, an external provider, the Board opted for a more flexible and cost-effective system. A web designer is scheduled to begin building the new system in September 2025. This change will also allow more tailored digital benefits for members.

New membership tiers have been introduced to distinguish between library subscriptions and individual or group memberships with access to OHS benefits. These changes are supported by revised communications, including a new leaflet written in a more engaging tone. While we were sorry to see the departure of our Membership Secretary, Jodie Neville, her contributions laid the groundwork for the new system and Polly Owen has kindly agreed to monitor our membership data on an interim basis, pending the appointment of Jodie's replacement.

THE ORAL HISTORY SOCIETY
CHAIRMAN'S REPORT
FOR THE YEAR ENDED 31 DECEMBER 2024

One of the Society's biggest sources of expenditure and hence risk, is our conference, largely a great deal of voluntary effort on the part of the organising committee ably supported by our conference manager, Polly Owen. In 2024 we decided to experiment with a different format and on 6 July 2024, in partnership with National Life Stories at the British Library, we held our first Oral History Festival. This one-day event replaced the annual OHS conference for 2024 and consisted of a series of participatory sessions exploring a variety of topics relating to oral history theory and practice. We received forty-five applications for session ideas and the day saw twenty-five sessions run on a variety of topics showcasing many innovative ideas to encourage listening, discussion and reflection. Held at the British Library, the event was a resounding success with over 140 attendees and the feedback was excellent - fulfilling our aim that the workshops should permit everyone to participate, whether they had experience in the field of months or decades. As it was a one-day event, this reduced attendance costs with a lower fee and the majority of attendees did not need to fund overnight accommodation. In 2025 the OHS will see a return to the traditional two-day conference (run in partnership with the Scottish Oral History Centre and the Scottish Oral History Group) but we will hold a Festival again in 2026 - aiming to alternate each summer between a two-day conference and one-day festival.

A final risk I'd like to highlight is the growing demand for our services which has put enormous pressure on a number of very active volunteers. Where it has been possible from a financial point of view we have employed staff to undertake some of that work where there are particular pressure points, such as bookkeeping, website maintenance and events management. We have been cautious in our approach, always looking to support volunteers and offer an excellent service to the oral history community. It has worked so far as the financial and membership figures indicate but it is an area of expenditure that requires us to be vigilant.

Efforts to improve website accessibility are ongoing following feedback about challenges for users with disabilities. An accessibility widget has been added, and the Society is striving to meet WCAG standards despite limited resources. A key achievement this year was the development of a 'Donate' page and updated guidance on funding for oral history projects. Between April 2024 and March 2025, 68,000 sessions were recorded on the OHS website, reflecting its role as a hub for advice, training, and oral history content. Popular pages continue to include training courses, job listings, and the journal. New blog posts and articles are drawing increasing traffic, suggesting growing engagement from practitioners and readers.

The Society's journal remains a cornerstone of its public and scholarly engagement. In 2024, the editors published its first online-only digital issue (52/3) based on the National Life Stories International Symposium held in the summer of 2023. This experiment with digital publishing featured interactive content, including full-colour images and audio clips, and received positive feedback. Print editions continued with the themes 'Coal and Community' (52/2) and 'Aftermaths' (53/1), offering rich scholarly insights. The journal also maintained its commitment to foregrounding practitioner news, which continues to be valued by readers.

Changes to the editorial team included the departure of Siobhan Warrington, who had expanded the journal's international correspondent network. Emma Jillings and Verusca Calabria will jointly take over her role. New appointments included Chandan Mahal as Learning Editor. Heather Norris Nicholson is leading a forthcoming special issue on climate change in collaboration with the Society's Climate and Environment and Climate Crisis Special Interest Group (SIG).

THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2024

The journal has expanded its online presence, publishing more articles and reviews through 'Oral History Online', allowing faster dissemination of work. Reviews in the print journal are now focused on longer thematic essays. The public history section continues to grow, although a vacancy arose following Abi Hunt's departure. The editors encourage wider participation and welcome contributions from oral historians at all stages of their work. In 2024, the Regional Network introduced a rotation model for the Network Regional Advisers Co-ordinators role, enabling more equitable participation. The OHS Regional Adviser Network (RAN) now comprises twenty-five advisers spread across twelve UK regions, offering support, expertise, and guidance in oral history. Their annual meeting in March 2025 at Nottingham Trent University, themed 'Oral History and Health', featured insightful presentations on topics including mental health, end-of-life interviewing, and trauma in oral histories. These events facilitated peer learning and showcased the therapeutic and documentary value of oral history, particularly in healthcare contexts. The RAN database, launched in March 2024, has captured over 100 hours of advisory work, improving transparency and helping track enquiries. Monthly virtual drop-ins hosted by RAs have also become valuable forums for knowledge exchange. The Society continues to recruit new advisers to fill vacancies and strengthen regional representation.

Training remains a vital strand of the Society's activity, delivered through its partnership with National Life Stories. In 2024, the Society ran 126 training sessions for 1,110 participants. These included both in-person and virtual formats, reaching a broad audience across the UK and internationally. New venues were added in Leeds and Bristol, with further expansions planned for 2025. A major innovation for 2025 is the course 'Life Story Interviewing Near the End of Life', replacing the earlier palliative care training. The curriculum addresses ethical and practical challenges in working with terminally ill interviewees, with three sessions planned for the coming year. Feedback from training participants highlighted the accessible and empowering approach of trainers. Testimonials praised the sessions for transforming attitudes toward interviewing, improving listening skills, and enhancing confidence. Tailored training remains a flexible offer for community and international groups. This year's training team, coordinated by Camille Johnston, includes seasoned professionals who continue to refine the curriculum.

Over the course of the year, the Society has rebranded its publicity efforts and expanded its reach on platforms like LinkedIn and Facebook. In response to safety and content concerns, OHS paused activity on X (formerly Twitter) across its main account and Special Interest Groups. A new presence on Bluesky is being considered. LinkedIn followers grew 330% to 357 since February 2024, and Facebook saw modest growth to 3,948 followers. The MailChimp e-newsletter now reaches 1,591 subscribers with an impressive 47% open rate, significantly above the nonprofit industry average. High click-through rates and low unsubscribe rates indicate strong engagement with content. These digital strategies have helped the Society communicate more effectively while maintaining a consistent monthly output to avoid overwhelming subscribers.

Special Interest Groups (SIGs) continue to be a vital part of the Society's work, supporting thematic development across areas like creative practice, LGBT histories, higher education, migration, and Environment and Climate Crisis. They remain integral to community-building and the exchange of specialised knowledge.

The in-dialogue series continued in 2024, underlining the Oral History Society's commitment to acquire greater awareness and appreciation of Global Majority history, involving critical reflection and greater inclusivity in terms of the Society's organisation, practice and publications. Three excellent events were held, the first featuring on the Co-production of History (Clinton Smith and Helen Paul), Oral Histories in Film and Video (Milton Brown and Danae Wellington) and Re-making Britain; South Asian connections and networks 1830s -present (Maya Parmar). The organising group, whilst delighted with the quality of the talks and the enthusiasm and evident commitment of the presenters, were disappointed with the attendance. In 2025 the group planned for four events but, due to unforeseen circumstances, have confirmed two events featuring Dr Juanita Cox and Kavita Puri both of which will be hybrid, with an online and an in-person option at London Metropolitan University.

THE ORAL HISTORY SOCIETY
CHAIRMAN'S REPORT
FOR THE YEAR ENDED 31 DECEMBER 2024

2024 was one of transition and purposeful growth for the Society. From rethinking its membership systems and accessibility standards to expanding training and digital publishing, the Society is positioning itself to be more agile, inclusive, and responsive. I would like to say a big thank you to the following Trustees who resigned from the Committee in 2024: Erin Farley, Emily Gibbs, and Jenny Vickers. I cannot conclude my report without thanking our members and volunteers who remain our greatest strength as the principal source of innovation, advice, and expertise. Thanks, too, to our paid support staff who play an integral and invaluable role in the successful running of the Society. Finally, I would like to thank the Trustees and Officers for their hard work, inspiration and encouragement and who collectively have helped to ensure the Society's success and financial security going forward.

THE ORAL HISTORY SOCIETY

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2024

The trustees present their report with the financial statements of the charity for the year ended 31 December 2024. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

The Oral History Society (OHS), founded in 1973, is a national charity dedicated to the collection, preservation and use of recorded memories and plays a key role in facilitating and developing the use of oral history. It aims to offer support, encouragement and best-practice advice to those conducting oral history, through its training courses run in conjunction with National Life Stories at the British Library, an annual conference, the twice-yearly publication of its journal Oral History, occasional seminars, a regional network of representatives, an interactive website, and several special interest groups. Oral History provides a local, national and international forum for oral historians to discuss the methods and challenges involved in the collection, interpretation and dissemination of oral testimonies. It includes a news section featuring reports from community projects around the globe. The print journal is supplemented by 'Oral History Journal Online' including online-only book reviews and articles. The Society represents oral historians no matter where they work, whether it is in academia, education, community organisations, museums, archives and libraries, or the media. The OHS seeks to support employed, freelance and voluntary individuals, and engage with a wide range of professional, statutory and advisory bodies to offer the best possible service to its members.

Activities

Ongoing activities include jointly running an extensive onsite and online training programme in partnership with National Life Stories at the British Library; supporting over forty experienced oral historians as locally-based Regional Networkers throughout Britain and Northern Ireland - a point of contact for anyone interested in oral history; offering technical, legal and ethical advice, principally via its website; providing information on the funding of oral history work; and publishing two editions of the journal Oral History each year. Members also receive a free e-newsletter several times a year with briefings and news items.

Several Special Interest Groups have been developed in response to increasing interest among members for ways to create networks and facilitate discussion and activities with others who share common interests and concerns. There are currently the following Special Interest Groups, each with their own committee and programme of meetings and activities: Archives and Oral History; Oral History in Higher Education; Environment and Climate Crisis; Migration; Lesbian, Gay Bisexual, Transgender and Queer (LGBTQ); and Creative Oral History. Further details at <https://www.ohs.org.uk/special-interests/>.

Public benefit

The Trustees confirm that they have complied with the duty in section 4 of the Charities Act 2011 to have due regard to public benefit guidance published by the Charity Commission in determining the activities undertaken by the Charity.

THE ORAL HISTORY SOCIETY
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2024

FINANCIAL REVIEW

Financial position

The board of trustees is satisfied that the charity's assets in each fund are available and adequate to fulfil its obligations in respect of each fund.

The financial statements have been prepared implementing the Charities Act 2011 and the Charities Financial Reporting Standard SORP FRS 102. As stated in the introduction to this report, the trustees consider the financial performance by the charity during the year to have been satisfactory.

The Statement of Financial Activities show incoming resources for the year of £58,596 (2023: £77,690) and outgoing resources of £50,772 (2023: £77,108), making a net overall surplus of £7,824 (2023: £582). Free unrestricted reserves amounted to £112,457 (2023: £104,653), of which designated fund were £4,949 (2023: Nil).

Reserves policy

It was agreed that unrestricted financial reserves should be maintained at no less than half average expenses of the previous financial year. The trustees are confident the charity has sufficient unrestricted reserves.

FUTURE PLANS

The trustees review the aims, objectives and activities of the charity on a regular basis. A full strategic review also takes place every 3-4 years when key future objectives and activities, and a business plan are agreed. This review also assesses what the charity has achieved and the outcomes of its work in the previous planning period. Each year trustees prepare a detailed annual report on each area of the Society's activities and the Chairman of the Society adds an overview report. This aggregated annual report is made available to members prior to the Annual General Meeting via the charity's website at <https://www.ohs.org.uk/who-we-are/society-documents/>.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes an unincorporated charity. Details can be seen on the OHS website at <https://www.ohs.org.uk/who-we-are/society-documents/>.

Trustee Selection

The Trustees meet four times a year. The Trustees are responsible for the governance of the Society and are elected at the Society's Annual General Meeting. Officers' positions of the Society include a Chair, Vice-Chair, Secretary and Treasurer who are also elected annually. An Officers' Group meets four or more times annually in between full trustee meetings to maintain the smooth running of the charity. The Trustees' sub-committees reflect priority areas and include a Finance sub-committee and a Nominations sub-committee. The journal is managed through an independent Editorial Board.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. For more information visit the OHS website at <https://www.ohs.org.uk/who-we-are/society-documents/>. A risk register is reviewed and updated as required on an annual basis.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity number

0288805

THE ORAL HISTORY SOCIETY

**REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2024**

Principal address

The Old Quarry House
Upper Aston
Montgomery
Powys
SY15 6TA

Trustees

Professor John Gabriel (Chair)
Dr Beth Thomas (Vice Chair)
Dr Robert Perks MBE (Secretary)
Dr Alan Butler (Treasurer)
Professor Joanna Bornat
Padmini Broomfield
Cynthia Brown
Dr Verusca Calabria
Faheem Chishti
Dr Juanita Cox
Rumi Nazeer Dahar
Juliana Dempsey
Erin Farley - Resigned 27th June 2024
Dr Craig Fees
Dr Emily Gibbs - Resigned 27th June 2024
Professor Jenny Harding
Jodie Neville - Appointed 27th June 2024 - Resigned December 2024
Dr Cai Parry-Jones
Mary Stewart
Dr Amy Tooth-Murphy
Jennifer Vickers - Resigned 27th June 2024
Hannah Wood - Appointed 27th June 2024

Independent Examiner

Anwer Patel BA (Hons), BFP, FCA
Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

Approved by order of the board of trustees on .2nd..July..2025..... and signed on its behalf by:



.....
Trustee : Prof John Gabriel

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
THE ORAL HISTORY SOCIETY**

Independent examiner's report to the trustees of The Oral History Society

I report to the charity trustees on my examination of the accounts of The Oral History Society (the Trust) for the year ended 31 December 2024.

Responsibilities and basis of report

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

I report in respect of my examination of the Trust's accounts carried out under Section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under Section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by Section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

A. PATEL

Anwer Patel BA (Hons), BFP, FCA

Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

Date:10/07/2025.....

THE ORAL HISTORY SOCIETY

**STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2024**

| | Notes | 31.12.24 Unrestricted funds £ | 31.12.23 Total funds £ |
|--|-------|---|---------------------------------|
| INCOME AND ENDOWMENTS FROM | | | |
| Donations and legacies | 2 | 5,197 | 2,755 |
| Other trading activities | 3 | 49,722 | 71,937 |
| Investment income | 4 | 3,677 | 2,998 |
| Total | | <u>58,596</u> | <u>77,690</u> |
| EXPENDITURE ON | | | |
| Raising funds | | 37,897 | 61,673 |
| Charitable activities | | | |
| General | | 12,875 | 15,435 |
| Total | | <u>50,772</u> | <u>77,108</u> |
| NET INCOME | | 7,824 | 582 |
| RECONCILIATION OF FUNDS | | | |
| Total funds brought forward | | 104,633 | 104,051 |
| TOTAL FUNDS CARRIED FORWARD | | <u>112,457</u> | <u>104,633</u> |

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY
STATEMENT OF FINANCIAL POSITION
31 DECEMBER 2024

| | Notes | 31.12.24 Unrestricted funds £ | 31.12.23 Total funds £ |
|--|-------|--|---------------------------------|
| CURRENT ASSETS | | | |
| Debtors | 7 | 9,153 | 6,294 |
| Cash at bank | | <u>125,614</u> | <u>118,611</u> |
| | | 134,767 | 124,905 |
| CREDITORS | | | |
| Amounts falling due within one year | 8 | <u>(22,310)</u> | <u>(20,272)</u> |
| NET CURRENT ASSETS | | <u>112,457</u> | <u>104,633</u> |
| TOTAL ASSETS LESS CURRENT LIABILITIES | | 112,457 | 104,633 |
| NET ASSETS | | <u><u>112,457</u></u> | <u><u>104,633</u></u> |


The notes form part of these financial statements


THE ORAL HISTORY SOCIETY


STATEMENT OF FINANCIAL POSITION - continued
31 DECEMBER 2024

| | | | |
|--------------------------------|---|----------------|----------------|
| FUNDS | 9 | | |
| Unrestricted funds: | | | |
| General fund | | 107,508 | 104,633 |
| Designated Funds - Future Fund | | 4,949 | - |
| | | <u>112,457</u> | <u>104,633</u> |
| TOTAL FUNDS | | <u>112,457</u> | <u>104,633</u> |

The financial statements were approved by the Board of Trustees and authorised for issue on 2nd July 2025..... and were signed on its behalf by:


.....
Trustee: Prof John Gabriel


.....
Trustee: Dr R. Perks


.....
Trustee: Dr A. Butler

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2024

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Going concern

The trustees are confident that they have sufficient funds to cover for their charitable activities for the next twelve months. As a result of this, the accounts have been prepared on a going concern basis.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Donations are recognised when the charity has been notified in writing of both the amount and settlement date. In the event that a donation is subject to conditions that require a level of performance before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those condition is wholly within the control of the charity and is probable that those conditions will be fulfilled in the reporting period.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. 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.

Irrecoverable VAT is charged as cost against the activity for which the expenditure was incurred.

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.

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 DECEMBER 2024

1. ACCOUNTING POLICIES - continued

Debtors

Basic financial assets, including trade and other debtors, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Such assets are subsequently carried at amortised cost using the effective interest method, less any impairment.

Creditors

Basic financial liabilities, including trade and other creditors, loans from third parties and loans from related parties, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Such instruments are subsequently carried at amortised cost using the effective interest method, less any impairment.

Related Party Note

The charity discloses related party transactions in the notes to the financial statements.

2. DONATIONS AND LEGACIES

| | 31.12.24 | 31.12.23 |
|----------------------|--------------|--------------|
| | £ | £ |
| Donations | - | 30 |
| Gift aid | 3,715 | 2,725 |
| Future Fund Donation | 1,482 | - |
| | <u>5,197</u> | <u>2,755</u> |

3. OTHER TRADING ACTIVITIES

| | 31.12.24 | 31.12.23 |
|-------------------------|---------------|---------------|
| | £ | £ |
| Income from Conferences | - | 27,386 |
| Subscription Income | 37,446 | 36,480 |
| Sundries | 3,580 | 3,678 |
| Advertising | 362 | 341 |
| Other Generating Funds | 5,456 | 4,052 |
| Income from Festivals | 2,878 | - |
| | <u>49,722</u> | <u>71,937</u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2024**

4. INVESTMENT INCOME

| | 31.12.24 | 31.12.23 |
|--------------------------|-------------------|-------------------|
| | £ | £ |
| Deposit account interest | 3,677 | 2,998 |
| | <u> </u> | <u> </u> |

5. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 December 2024 nor for the year ended 31 December 2023.

Trustees' expenses

| | 31.12.24 | 31.12.23 |
|--------------------|-------------------|-------------------|
| | £ | £ |
| Trustees' expenses | 1,806 | 3,723 |
| | <u> </u> | <u> </u> |

All expenses incurred in the year were solely for the travelling and training purposes.

6. KEY MANAGEMENT PERSONNEL

The Trust considers its key management personnel comprise of the trustees.

7. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

| | 31.12.24 | 31.12.23 |
|--------------------------------|-------------------|-------------------|
| | £ | £ |
| Trade debtors | 4,156 | 3,527 |
| Prepayments and accrued income | 4,997 | 2,767 |
| | <u> </u> | <u> </u> |
| | 9,153 | 6,294 |
| | <u> </u> | <u> </u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2024**

8. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

| | 31.12.24 | 31.12.23 |
|-----------------|---------------|---------------|
| | £ | £ |
| Trade creditors | 13,764 | 13,548 |
| Other creditors | 8,546 | 6,724 |
| | <u>22,310</u> | <u>20,272</u> |

9. MOVEMENT IN FUNDS

| | At 1/1/24 | Net movement in funds | Transfers between funds | At 31/12/24 |
|--------------------------------|----------------|-----------------------|-------------------------|----------------|
| | £ | £ | £ | £ |
| Unrestricted funds | | | | |
| General fund | 104,633 | 7,824 | (4,949) | 107,508 |
| Designated Funds - Future Fund | - | - | 4,949 | 4,949 |
| | <u>104,633</u> | <u>7,824</u> | <u>-</u> | <u>112,457</u> |
| TOTAL FUNDS | <u>104,633</u> | <u>7,824</u> | <u>-</u> | <u>112,457</u> |

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

| | Incoming resources | Resources expended | Movement in funds |
|---------------------------|--------------------|--------------------|-------------------|
| | £ | £ | £ |
| Unrestricted funds | | | |
| General fund | 58,596 | (50,772) | 7,824 |
| | <u>58,596</u> | <u>(50,772)</u> | <u>7,824</u> |
| TOTAL FUNDS | <u>58,596</u> | <u>(50,772)</u> | <u>7,824</u> |

Comparatives for movement in funds

| | At 1/1/23 | Net movement in funds | At 31/12/23 |
|---------------------------|----------------|-----------------------|----------------|
| | £ | £ | £ |
| Unrestricted funds | | | |
| General fund | 104,051 | 582 | 104,633 |
| | <u>104,051</u> | <u>582</u> | <u>104,633</u> |
| TOTAL FUNDS | <u>104,051</u> | <u>582</u> | <u>104,633</u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2024**

9. MOVEMENT IN FUNDS - continued

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

| | Incoming resources £ | Resources expended £ | Movement in funds £ |
|---------------------------|----------------------------|----------------------------|---------------------------|
| Unrestricted funds | | | |
| General fund | 77,690 | (77,108) | 582 |
| | <hr/> | <hr/> | <hr/> |
| TOTAL FUNDS | <u>77,690</u> | <u>(77,108)</u> | <u>582</u> |

Transfers - designated funds

The OHS Future Fund has been set up to support our volunteers better by offering them opportunities for further training and skills development, to enable them to come together more often to share knowledge and allow more of them to attend conferences and other events, often denied to them due to the costs involved. It is funded by donations. These funds are ring fenced and, in years when the society makes a surplus, all deposit account interest from the previous year will be added to the fund

10. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 December 2024.

THE ORAL HISTORY SOCIETY

**DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2024**

| | 31.12.24 | 31.12.23 |
|---------------------------------------|----------|----------|
| | £ | £ |
| INCOME AND ENDOWMENTS | | |
| Donations and legacies | | |
| Donations | - | 30 |
| Gift aid | 3,715 | 2,725 |
| Future Fund Donation | 1,482 | - |
| | 5,197 | 2,755 |
| Other trading activities | | |
| Income from Conferences | - | 27,386 |
| Subscription Income | 37,446 | 36,480 |
| Sundries | 3,580 | 3,678 |
| Advertising | 362 | 341 |
| Other Generating Funds | 5,456 | 4,052 |
| Income from Festivals | 2,878 | - |
| | 49,722 | 71,937 |
| Investment income | | |
| Deposit account interest | 3,677 | 2,998 |
| | 58,596 | 77,690 |
| EXPENDITURE | | |
| Raising donations and legacies | | |
| Subscription Services | 7,806 | 7,099 |
| Printing and Publishing | 22,369 | 20,712 |
| Conference Costs | - | 29,749 |
| Website | 2,549 | 4,113 |
| Festivals | 4,101 | - |
| Events Expenditure | 1,072 | - |
| | 37,897 | 61,673 |
| Charitable activities | | |
| Stationary and Printing | 2,198 | 2,232 |
| Bank Charges | 72 | 556 |
| Travel | - | 21 |
| Administrator | 2,278 | 2,688 |
| Carried forward | 4,548 | 5,497 |

This page does not form part of the statutory financial statements

THE ORAL HISTORY SOCIETY

**DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2024**

| | 31.12.24 | 31.12.23 |
|------------------------------|---------------|---------------|
| | £ | £ |
| Charitable activities | | |
| Brought forward | 4,548 | 5,497 |
| Special Interest Group | 65 | 236 |
| | <u>4,613</u> | <u>5,733</u> |
| Support costs | | |
| Management | | |
| Postage and stationery | 55 | 9 |
| Governance costs | | |
| Trustees' expenses | 1,806 | 3,723 |
| Independent Examiner's Fees | 1,550 | 1,185 |
| Bookkeeping | 4,851 | 4,785 |
| | <u>8,207</u> | <u>9,693</u> |
| Total resources expended | <u>50,772</u> | <u>77,108</u> |
| Net income | <u>7,824</u> | <u>582</u> |

This page does not form part of the statutory financial statements

THE ORAL HISTORY SOCIETY

England & Wales - Charity number 288805

Accounts

REGISTERED CHARITY NUMBER: 0288805

**REPORT OF THE TRUSTEES AND
FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2023
FOR
THE ORAL HISTORY SOCIETY**

Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

THE ORAL HISTORY SOCIETY

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| Independent Examiner's Report | 7 |
| Statement of Financial Activities | 8 |
| Statement of Financial Position | 9 |
| Notes to the Financial Statements | 10 to 14 |
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THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2023

2023 marked the Society's 50th birthday and we decided to celebrate this milestone in several ways over the course of the year, notably at our very successful annual conference 'Making Histories Together' at Nottingham Trent University when we took the opportunity to host a plenary discussion of the OHS over fifty years.

We also created a timeline of key activities over the half-century on our website and invited members to add their own recollections and stories from 1973 onwards and/or to write a blog post. As well as looking back, the opportunity to look forward to the next fifty years was afforded by our periodic strategic review held in March 2023. This review, led by trustees, has taken place since the early 2000s and this year our review was importantly informed by a survey of members' views. We decided to focus on two related priorities: growing our membership and our financial sustainability.

The financial position of the Society remains stable with over £100k of reserves but in the post-Covid/Brexit period we have faced some increased costs and in 2023 we made a small surplus of £582. These added costs have arisen in part from the need to pay for additional professional support to ensure a high standard of service to members and the wider oral history community, whilst at the same time relieving some of the pressure on our volunteers in what remains a largely voluntary-run Society. Moreover, costs like travel and catering, avoided during the Covid lockdown, began to re-emerge in 2023 and at higher prices. Whilst the benefits of online meetings are clear, we believe the importance of face-to-face gatherings is such that we should build the associated costs into our budget.

The prospect of managing these costs inevitably led us to re-visit our sources of income, the lion's share of which comes from membership subscriptions, hence the need to look again at our membership strategy. Evidence from our website, social media accounts and newsletters suggest that we have a much wider readership and following than our membership numbers indicate. For example, we have 5000 hits on our website every month and over 1500 subscribers to our monthly newsletter, but only 874 members.

Whilst we are committed to continuing to provide a public service, free of charge, our long-term sustainability will depend on increasing our membership. One practical outcome of our strategic review is to make it easier to join the Society. To do this we are developing an interface for new members which will smooth the membership process and should be in place by the beginning of 2025. We are also considering tiered memberships and restricting access to some of our services to members only.

Of course, there are other ways of generating income. To coincide with our anniversary, we introduced an endowment fund which we hope will allow us to support some of the fantastic work of our volunteers. We are also exploring other sources of external funding all of which we hope will ensure that the Society is around to celebrate its centenary in 2073.

The Oral History journal has published two issues since the last AGM, including a special edition on shared authority. Standard features in the journal include excellent sections on Current British Work and International projects and a review article. The journal has continued to develop its online presence with its shorter reviews and articles, the aim of which is to support those in the early stages of their careers as well as publishing with a quicker turnaround that complements the longer pieces in the journal.

Our training courses are amongst the most visited pages of our website and are reflected in the number of courses delivered (over 100) to 800 participants in 2023. The popularity of online courses, particularly for international attendees, has been maintained post-Covid whilst at the same time we have run in-person courses in Manchester and Leeds as well as London. 56 courses were offered that were tailored to the needs of individual projects and delivered online or in-person at different locations. I should add that members of the Higher Education Special Interest Group ran workshops at Leeds and London University (SOAS) aimed at postgraduate students planning their research projects.

THE ORAL HISTORY SOCIETY
CHAIRMAN'S REPORT
FOR THE YEAR ENDED 31 DECEMBER 2023

The OHS website home page has been re-vamped to publicise forthcoming events including those of our SIG and 'In Dialogue' discussions, details of the most recent issue of the journal and other news items. At the time of writing, the headline event is this year's Oral History Festival to be held on the 6th July at the British Library. The festival replaces our usual annual conference this year, which I'm delighted to report will return in 2025, in Glasgow.

Our Special Interest Groups continue to flourish, offering some lively discussions on a range of current issues, topics and projects in a variety of settings and often leading to innovative practices to disseminate oral histories. Of particular significance this year has been the re-emergence of the Migration Group and the continuing trend to hold joint meetings of the groups, including a highly successful one at our annual conference. Apart from the events, SIGs also provide invaluable networks of advice and support for OHS members through their online discussion groups.

The 'In Dialogue' series of events, organised in partnership with the Institute of Historical Research, continued with four events in 2023 and four more planned for 2024. The idea of 'in dialogue' was conceived in 2022 to critically reflect on our record of engagement with organisations that are visibly minoritised within the UK and whose aim is to remember, capture and preserve stories from members of these communities. The idea and commitment to dialogue follows from the Oral History Society's determination to acquire greater awareness and appreciation of global majority history, and the need for greater inclusivity in terms of the Society's organisation, practice and publications.

The OHS continues to campaign on national and international events that threaten the collection and archiving of oral histories. In 2023 we wrote letters supporting the University of Brighton's Centre for Memory Narrative and Histories and against its closure; and about the destruction of archives and libraries in Gaza. In neither case did our protests lead to a reversal of policy but the principle was important to state and, I would argue, important for those most directly affected to have our support.

Over the past twelve months we have said goodbye to a number of colleagues who have stepped down from their roles in the Society. I would like to thank Emily Gibbs, our Membership Officer, who has overseen a period in which the institutional and individual membership rates have remained fairly stable, though recently witnessing an increase in institutional and a small decline in individual membership. Emily will always be remembered for her wonderfully clear and colourful tables and graphs. Even when the data was a cause for concern it was a pleasure to look at them. Jodie Neville will replace Emily as Membership Officer, and we are delighted to welcome her to the Board.

Padmini Broomfield is also stepping down as Regional Network Coordinator. The Network plays a vital role in representing the interests and needs of oral history across the UK and relies entirely on the contributions and efforts of volunteers, a number of whom are working as freelancers and hence reliant on fixed-term commissions and projects. Under Padmini's guidance, the monthly online drop-in sessions have provided an important space for raising and sharing issues. The annual event this year was held in Leicester and highlighted some important developments including the role of artificial intelligence in oral history and the excellent idea of establishing a technology special interest group.

I should also like to thank Michelle Winslow and Malcolm Cowburn who are stepping down as trustees. Michelle in particular played a very significant role on the committee for many years and we are delighted that she will continue on the training group and as a regional adviser. We also were sorry to say goodbye to Eleanor Lowe who was our administrator for several years but were pleased to welcome Camille Johnston as her replacement during the course of the year.

THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2023

Finally, as always, I must express my gratitude to fellow officers, trustees and members for their friendship, loyalty, support and hard work. It is remarkable that the leading organisation in oral history in the UK over the last fifty years has built its reputation and made such a significant impact thanks to the voluntary efforts and expertise of members. Thank you!

John Gabriel, Chair, Oral History Society

THE ORAL HISTORY SOCIETY

REPORT OF THE TRUSTEES

FOR THE YEAR ENDED 31 DECEMBER 2023

The trustees present their report with the financial statements of the charity for the year ended 31 December 2023. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

The Oral History Society (OHS), founded in 1973, is a national charity dedicated to the collection, preservation and use of recorded memories and plays a key role in facilitating and developing the use of oral history. It aims to offer support, encouragement and best-practice advice to those conducting oral history, through its training courses run in conjunction with National Life Stories at the British Library, an annual conference, the twice-yearly publication of its journal Oral History, occasional seminars, a regional network of representatives, an interactive website, and several special interest groups. Oral History provides a local, national and international forum for oral historians to discuss the methods and challenges involved in the collection, interpretation and dissemination of oral testimonies. It includes a news section featuring reports from community projects around the globe. The print journal is supplemented by 'Oral History Journal Online' including online-only book reviews and articles. The Society represents oral historians no matter where they work, whether it is in academia, education, community organisations, museums, archives and libraries, or the media. The OHS seeks to support employed, freelance and voluntary individuals, and engage with a wide range of professional, statutory and advisory bodies to offer the best possible service to its members.

Activities

Ongoing activities include jointly running an extensive onsite and online training programme in partnership with National Life Stories at the British Library; supporting over forty experienced oral historians as locally-based Regional Networkers throughout Britain and Northern Ireland - a point of contact for anyone interested in oral history; offering technical, legal and ethical advice, principally via its website; providing information on the funding of oral history work; and publishing two editions of the journal Oral History each year. Members also receive a free e-newsletter several times a year with briefings and news items.

Several Special Interest Groups have been developed in response to increasing interest among members for ways to create networks and facilitate discussion and activities with others who share common interests and concerns. There are currently the following Special Interest Groups, each with their own committee and programme of meetings and activities: Archives and Oral History; Oral History in Higher Education; Environment and Climate Change; Migration; Lesbian, Gay Bisexual, Transgender and Queer (LBGTQ); and Creative Oral History. Further details at <https://www.ohs.org.uk/special-interests/>.

Public benefit

The Trustees confirm that they have complied with the duty in section 4 of the Charities Act 2011 to have due regard to public benefit guidance published by the Charity Commission in determining the activities undertaken by the Charity.

THE ORAL HISTORY SOCIETY

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2023

FINANCIAL REVIEW

Financial position

The board of trustees is satisfied that the charity's assets in each fund are available and adequate to fulfil its obligations in respect of each fund.

The financial statements have been prepared implementing the Charities Act 2011 and the Charities Financial Reporting Standard SORP FRS 102. As stated in the introduction to this report, the trustees consider the financial performance by the charity during the year to have been satisfactory.

The Statement of Financial Activities show incoming resources for the year of £77,690 (2022: £72,515) and outgoing resources of £77,108 (2022: £64,546), making a net overall surplus of £582 (2022: £7,969). Free unrestricted reserves amounted to £104,633 (prior year £104,051).

Reserves policy

It was agreed that unrestricted financial reserves should be maintained at no less than half average expenses of the previous financial year. The trustees are confident the charity has sufficient unrestricted reserves.

FUTURE PLANS

The trustees review the aims, objectives and activities of the charity on a regular basis. A full strategic review also takes place every 3-4 years when key future objectives and activities, and a business plan are agreed. This review also assesses what the charity has achieved and the outcomes of its work in the previous planning period. Each year trustees prepare a detailed annual report on each area of the Society's activities and the Chairman of the Society adds an overview report. This aggregated annual report is made available to members prior to the Annual General Meeting via the charity's website at <https://www.ohs.org.uk/who-we-are/society-documents/>.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes an unincorporated charity. Details can be seen on the OHS website at <https://www.ohs.org.uk/who-we-are/society-documents/>.

Trustee Selection

The Trustees meet four times a year. The Trustees are responsible for the governance of the Society and are elected at the Society's Annual General Meeting. Officers' positions of the Society include a Chair, Vice-Chair, Secretary and Treasurer who are also elected annually. An Officers' Group meets four or more times annually in between full trustee meetings to maintain the smooth running of the charity. The Trustees' sub-committees reflect priority areas and include a Finance sub-committee and a Nominations sub-committee. The journal is managed through an independent Editorial Board.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. For more information visit the OHS website at <https://www.ohs.org.uk/who-we-are/society-documents/>. A risk register is reviewed and updated as required on an annual basis.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity number

0288805

THE ORAL HISTORY SOCIETY
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2023

Principal address

The Old Quarry House
Upper Aston
Montgomery
Powys
SY15 6TA

Trustees

Professor John Gabriel (Chair)
Dr Beth Thomas (Vice Chair)
Dr Robert Perks MBE (Secretary)
Titi Faluyi (Treasurer) - resigned February 2023
Professor Joanna Bornat
Padmini Broomfield
Cynthia Brown
Dr Alan Butler
Dr Verusca Calabria
Faheem Chishti
Professor Malcolm Cowburn - resigned 25 December 2023
Dr Juanita Cox
Rumi Nazeer Dahar
Erin Farley
Dr Craig Fees
Dr Emily Gibbs
Professor Jenny Harding
Dr Cai Parry-Jones
Mary Stewart
Dr Amy Tooth-Murphy
Juliana Dempsey
Jennifer Vickers
Dr Michelle Winslow - resigned 6th June 2023

Independent Examiner

Anwer Patel BA (Hons), BFP, FCA
Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

Approved by order of the board of trustees on 08/08/24 and signed on its behalf by:



Trustee : Dr R. Perks

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE ORAL HISTORY SOCIETY

Independent examiner's report to the trustees of The Oral History Society

I report to the charity trustees on my examination of the accounts of The Oral History Society (the Trust) for the year ended 31 December 2023.

Responsibilities and basis of report

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

I report in respect of my examination of the Trust's accounts carried out under Section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under Section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by Section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



Anwer Patel BA (Hons), BFP, FCA

Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

Date: 12/08/2024

THE ORAL HISTORY SOCIETY

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2023

| | Notes | 31.12.23 Unrestricted fund £ | 31.12.22 Total funds £ |
|--|-------|---------------------------------------|---------------------------------|
| INCOME AND ENDOWMENTS FROM | | | |
| Donations and legacies | 2 | 2,755 | 2,479 |
| Other trading activities | 3 | 71,937 | 69,001 |
| Investment income | 4 | 2,998 | 1,035 |
| Total | | 77,690 | 72,515 |
| EXPENDITURE ON | | | |
| Raising funds | | 61,673 | 53,510 |
| Charitable activities | | | |
| General | | 15,435 | 11,036 |
| Total | | 77,108 | 64,546 |
| NET INCOME | | 582 | 7,969 |
| RECONCILIATION OF FUNDS | | | |
| Total funds brought forward | | 104,051 | 96,082 |
| TOTAL FUNDS CARRIED FORWARD | | 104,633 | 104,051 |


The notes form part of these financial statements

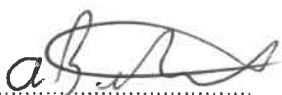
THE ORAL HISTORY SOCIETY


**STATEMENT OF FINANCIAL POSITION
31 DECEMBER 2023**

| | Notes | 31.12.23 Unrestricted fund £ | 31.12.22 Total funds £ |
|--|-------|---------------------------------------|---------------------------------|
| CURRENT ASSETS | | | |
| Debtors | 7 | 6,294 | 4,889 |
| Cash at bank | | 118,611 | 121,447 |
| | | <u>124,905</u> | <u>126,336</u> |
| CREDITORS | | | |
| Amounts falling due within one year | 8 | (20,272) | (22,285) |
| | | <u>104,633</u> | <u>104,051</u> |
| NET CURRENT ASSETS | | | |
| | | <u>104,633</u> | <u>104,051</u> |
| TOTAL ASSETS LESS CURRENT LIABILITIES | | | |
| | | <u>104,633</u> | <u>104,051</u> |
| NET ASSETS | | | |
| | | <u>104,633</u> | <u>104,051</u> |
| FUNDS | | | |
| Unrestricted funds | 9 | 104,633 | 104,051 |
| | | <u>104,633</u> | <u>104,051</u> |
| TOTAL FUNDS | | | |
| | | <u>104,633</u> | <u>104,051</u> |

The financial statements were approved by the Board of Trustees and authorised for issue on 08/08/24 and were signed on its behalf by:


Trustee : Prof. J. Gabriel


Trustee : Dr A. Butler


Trustee : Dr R. Perles

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2023

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Going concern

The trustees are confident that they have sufficient funds to cover for their charitable activities for the next twelve months. As a result of this, the accounts have been prepared on a going concern basis.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Donations are recognised when the charity has been notified in writing of both the amount and settlement date. In the event that a donation is subject to conditions that require a level of performance before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those condition is wholly within the control of the charity and is probable that those conditions will be fulfilled in the reporting period.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. 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.

Irrecoverable VAT is charged as cost against the activity for which the expenditure was incurred.

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.

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 DECEMBER 2023

1. ACCOUNTING POLICIES - continued

Debtors

Basic financial assets, including trade and other debtors, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Such assets are subsequently carried at amortised cost using the effective interest method, less any impairment.

Creditors

Basic financial liabilities, including trade and other creditors, loans from third parties and loans from related parties, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Such instruments are subsequently carried at amortised cost using the effective interest method, less any impairment.

Related Party Note

The charity discloses related party transactions in the notes to the financial statements.

2. DONATIONS AND LEGACIES

| | 31.12.23 | 31.12.22 |
|-----------|--------------|--------------|
| | £ | £ |
| Donations | 30 | - |
| Gift aid | 2,725 | 2,479 |
| | <u>2,755</u> | <u>2,479</u> |

3. OTHER TRADING ACTIVITIES

| | 31.12.23 | 31.12.22 |
|-------------------------|---------------|---------------|
| | £ | £ |
| Income from Conferences | 27,386 | 24,314 |
| Subscription Income | 36,480 | 35,619 |
| Sundries | 3,678 | 3,677 |
| Advertising | 341 | 232 |
| Other Generating Funds | 4,052 | 5,159 |
| | <u>71,937</u> | <u>69,001</u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2023**

| | | | |
|-----------|--------------------------|-----------------|--------------|
| 4. | INVESTMENT INCOME | 31.12.23 | 31.12.22 |
| | | £ | £ |
| | Deposit account interest | <u>2,998</u> | <u>1,035</u> |

5. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 December 2023 nor for the year ended 31 December 2022.

Trustees' expenses

| | | |
|--------------------|-----------------|--------------|
| | 31.12.23 | 31.12.22 |
| | £ | £ |
| Trustees' expenses | <u>3,723</u> | <u>1,278</u> |

All expenses incurred in the year were solely for the travelling and training purposes.

6. KEY MANAGEMENT PERSONNEL

The Trust considers its key management personnel comprise of the trustees.

7. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

| | | |
|--------------------------------|-----------------|--------------|
| | 31.12.23 | 31.12.22 |
| | £ | £ |
| Trade debtors | 3,527 | 3,756 |
| Prepayments and accrued income | <u>2,767</u> | <u>1,133</u> |
| | <u>6,294</u> | <u>4,889</u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2023**

8. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

| | 31.12.23 | 31.12.22 |
|-----------------|-----------------|---------------|
| | £ | £ |
| Trade creditors | 13,548 | 14,428 |
| Other creditors | 6,724 | 7,857 |
| | <u>20,272</u> | <u>22,285</u> |

9. MOVEMENT IN FUNDS

| | At 1/1/23 | Net movement in funds | At 31/12/23 |
|---------------------------|----------------|-----------------------------|----------------|
| | £ | £ | £ |
| Unrestricted funds | | | |
| General fund | 104,051 | 582 | 104,633 |
| | <u>104,051</u> | <u>582</u> | <u>104,633</u> |

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

| | Incoming resources | Resources expended | Movement in funds |
|---------------------------|-----------------------|-----------------------|----------------------|
| | £ | £ | £ |
| Unrestricted funds | | | |
| General fund | 77,690 | (77,108) | 582 |
| | <u>77,690</u> | <u>(77,108)</u> | <u>582</u> |

Comparatives for movement in funds

| | At 1/1/22 | Net movement in funds | At 31/12/22 |
|---------------------------|---------------|-----------------------------|----------------|
| | £ | £ | £ |
| Unrestricted funds | | | |
| General fund | 96,082 | 7,969 | 104,051 |
| | <u>96,082</u> | <u>7,969</u> | <u>104,051</u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2023**

9. MOVEMENT IN FUNDS - continued

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

| | Incoming resources £ | Resources expended £ | Movement in funds £ |
|---------------------------|----------------------------|----------------------------|---------------------------|
| Unrestricted funds | | | |
| General fund | 72,515 | (64,546) | 7,969 |
| | <u> </u> | <u> </u> | <u> </u> |
| TOTAL FUNDS | <u>72,515</u> | <u>(64,546)</u> | <u>7,969</u> |

10. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 December 2023.

THE ORAL HISTORY SOCIETY

England & Wales - Charity number 288805

Accounts

REGISTERED CHARITY NUMBER: 0288805

**REPORT OF THE TRUSTEES AND
FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2022
FOR
THE ORAL HISTORY SOCIETY**

Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

THE ORAL HISTORY SOCIETY

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THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2022

This year we celebrate the fiftieth anniversary of the Oral History Society and as Chair, I would like to thank all our members and supporters over the years who collectively have made such a significant contribution to oral history and the Oral History Society. Entering its fiftieth year, the Society is thriving. In financial terms, we ended 2022 with a surplus of £7,969 and reserves of £104,051. 2022 saw a modest increase in our membership which now stands at 892. The **annual conference** held at London Met on the theme of 'Home' attracted a large and diverse group of participants, partly as a result of the choice of theme and the outreach work undertaken by the conference organising group. Apart from an excellent set of plenary sessions and a wider range of papers, particularly pleasing was the hybrid format which allowed participants unable to attend in person for financial and/or geographical reasons to take part online. Our fundraising and bursary scheme also helped to attract participants who would have otherwise been unable to attend.

In 2022, the **Oral History Journal** saw a number of changes in the editorial team not least of which was Kate Melvin's sudden death which left a big hole in not only the editorial group but the Society as a whole. Despite this loss, the journal published two outstanding issues in 2022. The Spring issue focussed on the relationship between the interviewer and interviewee in terms of identity and sense of self and the Autumn issue was devoted to oral histories in troubling environments. The journal editors have also been liaising closely with our website group to publish shorter online reviews, blogs, transcripts and audio pieces. We are hoping to further strengthen links between the journal and OHS and would welcome members' views on how else we might achieve this.

The National Life Stories/OHS **training programme** delivered 120 courses to 988 individuals in 2022. Of the total number of attendees, around 60% of training participants joined a remote course and 7% of training participants joined a course from outside the UK. The 'Introduction to Oral History' was the most popular and a new nine-week introductory course has been developed. Other tailored courses included: 'Digital Audio Editing'; 'Archival Management of Oral History Collections'; 'Designing and Planning your Oral History Project'; 'Advanced Oral History'; 'Oral History in Palliative Care'; 'Transcript to Script' and 'Introduction to GDPR for Oral Historians'. We are open to suggestions on improving our training offers and are giving consideration to feedback from the online survey regarding the process of appointing trainers and the inclusivity of the training group.

As always, the **Special Interests Groups (SIGs)** ran some innovative and exciting events for members in 2022. The Creative SIG held a very well-received event on podcasting. The Archives and Oral History SIG ran a joint meeting with the US Oral History Association's Archives Interest Group and has been very successful in making international links in Australia and Europe as well as participating in a joint session with the Higher Education SIG. The latter saw the first peer-reviewed article to emerge from a SIG on oral history in doctoral research. The Environmental SIG launched the International Oral History of Transition Movement, the first international collaboration to be generated and led by a SIG, which brought together local communities from the UK, Europe and North America who are working to reduce dependence on fossil fuels and to mitigate climate. In June the LGBTQ SIG hosted online events and discussions on the situation for LGBTQ people in Ukraine and Russia and another on the theme of queer ruralities.

Our **Regional Network** celebrated its thirtieth anniversary in 2022. There are thirty networkers over twelve regions, many of whom attended the RN's annual event in Birmingham and met each other in person for the first time since the pandemic. In addition, the Network has continued to run its very successful monthly online drop-ins which have fostered dialogue and a sense of cohesion amongst networkers as well as a forum for instigating some important conversations. The Network is made up of a group of dedicated oral historians many of whom are self-employed freelance oral historians. They represent the kind of dilemma we hope to address through our strategic review, that is to strike a more reasonable and realistic balance between the Society's extraordinary voluntary efforts and the need to acknowledge and leave space for members to pursue their respective professional roles. We hope that the Network's excellent twelve-point action plan will address this as well as provide the means to attract a younger more visibly diverse membership.

THE ORAL HISTORY SOCIETY
CHAIRMAN'S REPORT
FOR THE YEAR ENDED 31 DECEMBER 2022

Every five years or so the Society holds a **strategic review weekend** at which Trustees and a few invitees from the wider membership take stock of where we are and where we'd like to get to in the coming period, and produce a plan to bring our ideas to fruition. In our most recent review weekend in March 2023, we identified a number of key challenges and risks for the Society, notably an overall increase in costs but particularly those associated with a growing need for paid professional support at a time when the capacity of our volunteers has been stretched to its limits. So we highlighted four themes for discussion: improving benefits for members; improving communications; widening participation; and financial sustainability. We would welcome members' thoughts and ideas on ways forward but we are looking at: making joining the OHS easier; creating different tiers of membership; seeing if there is a case for making some parts of our website only open to members; developing a closer relationship between the Oral History Journal and the OHS website; re-thinking the role and responsibilities of our Regional Network and Special Interest Groups, and considering ways in which the Society can provide further support to these integral and invaluable arms of the organisation.

We intend to give greater prominence to **member feedback** and respond to criticisms as those highlighted in our most recent survey, for example, a London-centric bias, lack of visible diversity, sparse feedback on Trustee actions, the need to respond to non-academic interests and the need to clarify the Society's relationship to the British Library. These are just some of the responses of members and some non-members who kindly completed our online survey. We are committed to responding to your concerns.

To mark this fiftieth anniversary year, the Society's 2023 annual conference in Nottingham will host a series of plenary talks and sessions to reflect on the past and future of the Society. Last year we found that the **Annual General Meeting** was too rushed when held in the course of the annual conference, so we have decided to run the 2023 AGM as a separate online event to allow more time and for the maximum number of members the opportunity to attend. At our weekend we took the reluctant decision not to run our major annual conference in 2024. It is currently our biggest cost and one that has increased with the hybrid format used in 2022 and in 2023. The expenditure has to cover all the labour, room hire, catering etc required for an in-person conference plus the technology and people expertise to stream it worldwide. The risks, both financial and technical are significant, hence our decision to pause. We will use the time to explore different models but are committed to hosting an event that will allow members to come together at least once during the year. We would welcome any ideas on format, etc. and you have any thoughts more generally on the proposals or discussion points above.

2023 continued to see improvements in our **communications** which can be traced back to our previous strategy weekend and the excellent work of the governance working group. The results can be seen in the numbers accessing our different channels of communication. Our Twitter account had 8,000 followers (including 700 new ones per month), our YouTube channel has had 6,000 views, 5,600 visit our website every month, 1,600 access the monthly newsletter and our blog has thirty-two articles. Our **website** has also been enhanced this year with advice to help interviewers take care of their own well-being when undertaking difficult oral history projects. It also includes best practice guidelines for those employing freelance oral historians and therefore begins to address one piece of feedback from the member survey which called for more support for freelancers. Groups.io continues to provide important information and advice to members as well as being the starting point for some important conversations. However, groups.io is only used by around a quarter of our members. If members have thoughts on why this is please let us know. For example, at the strategy weekend, one of our younger trustees thought that there may be more effective ways of reaching out to younger people.

THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2022

You may have already looked at the **fiftieth anniversary timeline** which appears on our website (<https://www.ohs.org.uk/ohs50-timeline/>). Our aim is to collect as many members' stories as possible as well as archive materials going back over the last fifty years. Please contribute if you can. We would love to hear from you. As part of our fiftieth celebrations, we are also hosting a second series of '**In Dialogue**' seminars in 2023 in partnership with the Institute of Historical Research. These events provide a space for an exchange of ideas and experiences between the OHS and organisations working with visibly diverse communities with the aim of building stronger links between our organisations.

Please feel free to email me directly (j.gabriel@londonmet.ac.uk) or the Secretary, Rob Perks (rob.perks@bl.uk) about any of the issues mentioned in the report or anything else that you would like to say.

To conclude, I'd like to extend an enormous thank you to my fellow officers and trustees, to SIG members, the Regional Network and our wider membership for your dedication and support. The opportunity to celebrate our fiftieth anniversary is down to the vision, commitment and the achievements of all those who have served the Society from 1973 to the present

THE ORAL HISTORY SOCIETY

REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2022

The trustees present their report with the financial statements of the charity for the year ended 31 December 2022. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

The Oral History Society (OHS), founded in 1973, is a national charity dedicated to the collection, preservation and use of recorded memories and plays a key role in facilitating and developing the use of oral history. It aims to offer support, encouragement and best-practice advice to those conducting oral history, through its training courses run in conjunction with National Life Stories at the British Library, an annual conference, the twice-yearly publication of its journal *Oral History*, occasional seminars, a regional network of representatives, an interactive website, and several special interest groups. *Oral History* provides a local, national and international forum for oral historians to discuss the methods and challenges involved in the collection, interpretation and dissemination of oral testimonies. It includes a news section featuring reports from community projects around the globe. The print journal is supplemented by 'Oral History Journal Online' including online-only book reviews and articles. The Society represents oral historians no matter where they work, whether it is in academia, education, community organisations, museums, archives and libraries, or the media. The OHS seeks to support employed, freelance and voluntary individuals, and engage with a wide range of professional, statutory and advisory bodies to offer the best possible service to its members.

Activities

Ongoing activities include jointly running an extensive onsite and online training programme in partnership with National Life Stories at the British Library; supporting over forty experienced oral historians as locally-based Regional Networkers throughout Britain and Northern Ireland - a point of contact for anyone interested in oral history; offering technical, legal and ethical advice, principally via its website; providing information on the funding of oral history work; and publishing two editions of the journal *Oral History* each year. Members also receive a free e-newsletter several times a year with briefings and news items.

Several Special Interest Groups have been developed in response to increasing interest among members for ways to create networks and facilitate discussion and activities with others who share common interests and concerns. There are currently the following Special Interest Groups, each with their own committee and programme of meetings and activities: Archives and Oral History; Oral History in Higher Education; Environment and Climate Change; Migration; Lesbian, Gay Bisexual, Transgender and Queer (LBGTQ); and Creative Oral History. Further details at <https://www.ohs.org.uk/special-interests/>.

Public benefit

The Trustees confirm that they have complied with the duty in section 4 of the Charities Act 2011 to have due regard to public benefit guidance published by the Charity Commission in determining the activities undertaken by the Charity.

THE ORAL HISTORY SOCIETY
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2022

FINANCIAL REVIEW

Financial position

The board of trustees is satisfied that the charity's assets in each fund are available and adequate to fulfil its obligations in respect of each fund.

The financial statements have been prepared implementing the Charities Act 2011 and the Charities Financial Reporting Standard SORP FRS 102. As stated in the introduction to this report, the trustees consider the financial performance by the charity during the year to have been satisfactory.

The Statement of Financial Activities show incoming resources for the year of £72,515 (2021: £49,247) and outgoing resources of £64,546 (2021: £48,923), making a net overall surplus of £7,969 (2021: £324). Free unrestricted reserves amounted to £104,051 (prior year £96,082).

Reserves policy

It was agreed that unrestricted financial reserves should be maintained at no less than half average expenses of the previous financial year. The trustees are confident the charity has sufficient unrestricted reserves.

FUTURE PLANS

The trustees review the aims, objectives and activities of the charity on a regular basis. A full strategic review also takes place every 3-4 years when key future objectives and activities, and a business plan are agreed. This review also assesses what the charity has achieved and the outcomes of its work in the previous planning period. Each year trustees prepare a detailed annual report on each area of the Society's activities and the Chairman of the Society adds an overview report. This aggregated annual report is made available to members prior to the Annual General Meeting via the charity's website at <https://www.ohs.org.uk/who-we-are/society-documents/>.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes an unincorporated charity. Details can be seen on the OHS website at <https://www.ohs.org.uk/who-we-are/society-documents/>.

Trustee Selection

The Trustees meet four times a year. The Trustees are responsible for the governance of the Society and are elected at the Society's Annual General Meeting. Officers' positions of the Society include a Chair, Vice-Chair, Secretary and Treasurer who are also elected annually. An Officers' Group meets four or more times annually in between full trustee meetings to maintain the smooth running of the charity. The Trustees' sub-committees reflect priority areas and include a Finance sub-committee and a Nominations sub-committee. The journal is managed through an independent Editorial Board.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. For more information visit the OHS website at <https://www.ohs.org.uk/who-we-are/society-documents/>. A risk register is reviewed and updated as required on an annual basis.

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity number

0288805

THE ORAL HISTORY SOCIETY
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2022

Principal address
The Old Quarry House
Upper Aston
Montgomery
Powys
SY15 6TA

Trustees


Professor John Gabriel (Chair)
Dr Beth Thomas (Vice Chair)
Dr Robert Perks MBE (Secretary)
Titi Faluyi (Treasurer) – resigned February 2023
Professor Joanna Bornat
Padmini Broomfield
Cynthia Brown
Dr Alan Butler
Dr Verusca Calabria
Fahcem Chishti - elected 9 July 2022
Professor Malcolm Cowburn
Dr Juanita Cox - elected 9 July 2022
Erum Nazeer Dahar - elected 9 July 2022
Erin Farley
Dr Craig Fees
Dr Emily Gibbs
Professor Jenny Harding
Dr Cai Parry-Jones
Mary Stewart
Dr Amy Tooth-Murphy
Juliana Vandegrift
Jennifer Vickers
Dr Michelle Winslow

Independent Examiner

Anwer Patel BA (Hons), BFP, FCA
Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

Approved by order of the board of trustees on 15th June 2023 and signed on its behalf by:

Beth Thomas
Trustee of Dr Beth Thomas


DR Robert Perks

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
THE ORAL HISTORY SOCIETY**

Independent examiner's report to the trustees of The Oral History Society

I report to the charity trustees on my examination of the accounts of The Oral History Society (the Trust) for the year ended 31 December 2022.

Responsibilities and basis of report

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

I report in respect of my examination of the Trust's accounts carried out under Section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under Section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by Section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

A PATEL

Anwer Patel BA (Hons), BFP, FCA

Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

Date:

THE ORAL HISTORY SOCIETY

**STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2022**

| | Notes | 31.12.22 | 31.12.21 |
|--|-------|------------------------------------|---------------------|
| | | Unrestricted fund £ | Total funds £ |
| INCOME AND ENDOWMENTS FROM | | | |
| Donations and legacies | 2 | 2,479 | 2,239 |
| Other trading activities | 3 | 69,001 | 46,283 |
| Investment income | 4 | <u>1,035</u> | <u>725</u> |
| Total | | <u>72,515</u> | <u>49,247</u> |
| EXPENDITURE ON | | | |
| Raising funds | | 53,510 | 40,288 |
| Charitable activities | | | |
| General | | <u>11,036</u> | <u>8,635</u> |
| Total | | <u>64,546</u> | <u>48,923</u> |
| NET INCOME | | 7,969 | 324 |
| RECONCILIATION OF FUNDS | | | |
| Total funds brought forward | | <u>96,082</u> | <u>95,758</u> |
| TOTAL FUNDS CARRIED FORWARD | | <u>104,051</u> | <u>96,082</u> |

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY

STATEMENT OF FINANCIAL POSITION
31 DECEMBER 2022

| | Notes | 31.12.22 Unrestricted fund £ | 31.12.21 Total funds £ |
|--|-------|---------------------------------------|---------------------------------|
| CURRENT ASSETS | | | |
| Debtors | 7 | 4,889 | 2,581 |
| Cash at bank | | <u>121,447</u> | <u>106,732</u> |
| | | 126,336 | 109,313 |
| CREDITORS | | | |
| Amounts falling due within one year | 8 | (22,285) | (13,231) |
| | | <u>104,051</u> | <u>96,082</u> |
| NET CURRENT ASSETS | | | |
| | | <u>104,051</u> | <u>96,082</u> |
| TOTAL ASSETS LESS CURRENT LIABILITIES | | <u>104,051</u> | <u>96,082</u> |
| NET ASSETS | | <u>104,051</u> | <u>96,082</u> |
| FUNDS | 9 | | |
| Unrestricted funds | | <u>104,051</u> | <u>96,082</u> |
| TOTAL FUNDS | | <u>104,051</u> | <u>96,082</u> |

The financial statements were approved by the Board of Trustees and authorised for issue on 15th June 2023 and were signed on its behalf by:

J. E. Gabriel
Trustee: Prof. John Gabriel

Beth Thomas
Trustee: Dr Beth Thomas

Dr Robert Perks
Trustee: Dr Robert Perks

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2022

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Going concern

The trustees are confident that they have sufficient funds to cover for their charitable activities for the next twelve months. As a result of this, the accounts have been prepared on a going concern basis.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Donations are recognised when the charity has been notified in writing of both the amount and settlement date. In the event that a donation is subject to conditions that require a level of performance before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those condition is wholly within the control of the charity and is probable that those conditions will be fulfilled in the reporting period.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. 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.

Irrecoverable VAT is charged as cost against the activity for which the expenditure was incurred.

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.

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 DECEMBER 2022

1. ACCOUNTING POLICIES - continued

Debtors

Basic financial assets, including trade and other debtors, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Such assets are subsequently carried at amortised cost using the effective interest method, less any impairment.

Creditors

Basic financial liabilities, including trade and other creditors, loans from third parties and loans from related parties, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Such instruments are subsequently carried at amortised cost using the effective interest method, less any impairment.

Related Party Note

The charity discloses related party transactions in the notes to the financial statements.

2. DONATIONS AND LEGACIES

| | 31.12.22 | 31.12.21 |
|----------|--------------|--------------|
| | £ | £ |
| Gift aid | <u>2,479</u> | <u>2,239</u> |

3. OTHER TRADING ACTIVITIES

| | 31.12.22 | 31.12.21 |
|-------------------------|---------------|---------------|
| | £ | £ |
| Income from Conferences | 24,314 | 9,239 |
| Subscription Income | 35,619 | 30,389 |
| Sundries | 3,677 | 3,162 |
| Advertising | 232 | 261 |
| Other Generating Funds | <u>5,159</u> | <u>3,232</u> |
| | <u>69,001</u> | <u>46,283</u> |

4. INVESTMENT INCOME

| | 31.12.22 | 31.12.21 |
|--------------------------|--------------|------------|
| | £ | £ |
| Deposit account interest | <u>1,035</u> | <u>725</u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2022**

5. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 December 2022 nor for the year ended 31 December 2021.

Trustees' expenses

| | 31.12.22 | 31.12.21 |
|--------------------|--------------|--------------|
| | £ | £ |
| Trustees' expenses | <u>1,278</u> | <u>1,056</u> |

All expenses incurred in the year were solely for the travelling and training purposes.

6. KEY MANAGEMENT PERSONNEL

The Trust considers its key management personnel comprise of the trustees.

7. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

| | 31.12.22 | 31.12.21 |
|--------------------------------|--------------|--------------|
| | £ | £ |
| Trade debtors | 3,756 | 1,814 |
| Prepayments and accrued income | <u>1,133</u> | <u>767</u> |
| | <u>4,889</u> | <u>2,581</u> |

8. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

| | 31.12.22 | 31.12.21 |
|-----------------|---------------|---------------|
| | £ | £ |
| Trade creditors | 14,428 | 1,900 |
| Other creditors | <u>7,857</u> | <u>11,331</u> |
| | <u>22,285</u> | <u>13,231</u> |

9. MOVEMENT IN FUNDS

| | At 1/1/22 | Net movement in funds | At 31/12/22 |
|---------------------------|-------------------|-----------------------------|-------------------|
| | £ | £ | £ |
| Unrestricted funds | | | |
| General fund | 96,082 | 7,969 | 104,051 |
| | <u> </u> | <u> </u> | <u> </u> |
| TOTAL FUNDS | <u>96,082</u> | <u>7,969</u> | <u>104,051</u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2022**

9. MOVEMENT IN FUNDS - continued

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

| | Incoming resources £ | Resources expended £ | Movement in funds £ |
|---------------------------|----------------------------|----------------------------|---------------------------|
| Unrestricted funds | | | |
| General fund | 72,515 | (64,546) | 7,969 |
| | <hr/> | <hr/> | <hr/> |
| TOTAL FUNDS | <u>72,515</u> | <u>(64,546)</u> | <u>7,969</u> |

Comparatives for movement in funds

| | At 1/1/21 £ | Net movement in funds £ | At 31/12/21 £ |
|---------------------------|----------------|----------------------------------|---------------------|
| Unrestricted funds | | | |
| General fund | 95,758 | 324 | 96,082 |
| | <hr/> | <hr/> | <hr/> |
| TOTAL FUNDS | <u>95,758</u> | <u>324</u> | <u>96,082</u> |

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

| | Incoming resources £ | Resources expended £ | Movement in funds £ |
|---------------------------|----------------------------|----------------------------|---------------------------|
| Unrestricted funds | | | |
| General fund | 49,247 | (48,923) | 324 |
| | <hr/> | <hr/> | <hr/> |
| TOTAL FUNDS | <u>49,247</u> | <u>(48,923)</u> | <u>324</u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2022**

10. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 December 2022.

THE ORAL HISTORY SOCIETY

**DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2022**

| | 31.12.22 | 31.12.21 |
|---------------------------------------|---------------|---------------|
| | £ | £ |
| INCOME AND ENDOWMENTS | | |
| Donations and legacies | | |
| Gift aid | 2,479 | 2,239 |
| Other trading activities | | |
| Income from Conferences | 24,314 | 9,239 |
| Subscription Income | 35,619 | 30,389 |
| Sundries | 3,677 | 3,162 |
| Advertising | 232 | 261 |
| Other Generating Funds | <u>5,159</u> | <u>3,232</u> |
| | 69,001 | 46,283 |
| Investment income | | |
| Deposit account interest | <u>1,035</u> | <u>725</u> |
| Total incoming resources | 72,515 | 49,247 |
| EXPENDITURE | | |
| Raising donations and legacies | | |
| Subscription Services | 6,930 | 6,819 |
| Printing and Publishing | 18,733 | 17,972 |
| Conference Costs | 25,554 | 12,927 |
| Website | <u>2,293</u> | <u>2,570</u> |
| | 53,510 | 40,288 |
| Charitable activities | | |
| Stationary and Printing | 956 | 165 |
| Bank Charges | 524 | 473 |
| Administrator | 1,771 | 567 |
| Video Conferencing | <u>288</u> | <u>288</u> |
| | 3,539 | 1,493 |
| Support costs | | |
| Governance costs | | |
| Trustees' expenses | 1,278 | 1,056 |
| Carried forward | <u>1,278</u> | <u>1,056</u> |

This page does not form part of the statutory financial statements

THE ORAL HISTORY SOCIETY

**DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2022**

| | 31.12.22 | 31.12.21 |
|----------------------------|---------------|---------------|
| | £ | £ |
| Governance costs | | |
| Brought forward | 1,278 | 1,056 |
| Accountancy and legal fees | 1,740 | 1,516 |
| Bookkeeping | <u>4,479</u> | <u>4,570</u> |
| | <u>7,497</u> | <u>7,142</u> |
| Total resources expended | <u>64,546</u> | <u>48,923</u> |
| Net income | <u>7,969</u> | <u>324</u> |

This page does not form part of the statutory financial statements

THE ORAL HISTORY SOCIETY

England & Wales - Charity number 288805

Accounts

REGISTERED CHARITY NUMBER: 0288805

**REPORT OF THE TRUSTEES AND
FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2021
FOR
THE ORAL HISTORY SOCIETY**

Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

THE ORAL HISTORY SOCIETY

CONTENTS OF THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2021

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THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2021

Next year the Oral History Society will be fifty years old which makes this report the final one before what will be a time for celebration and reflection as well as for looking forward. This anniversary will also coincide with the launch of our new strategic plan which we will begin to draft at our two-day away event in December 2022. One constant over our 49-year history has been the extraordinary efforts of our volunteers and once again their industry and achievements form the backbone of my report.

The global pandemic, despite popular beliefs to the contrary, continues to cause suffering and loss of life. This has presented public health and financial risks for the Society which we have sought to mitigate in a number of ways. We have observed safety protocols and continued to meet on Zoom and conduct other communications via our website, newsletter and groups.io. There are plans for one of our Special Interest Groups (SIGs) to meet in person and this year's annual conference 'Home' will be hybrid, allowing the option of both but with the necessary precautions in place.

Financially, the Society fared better than many organisations have during the pandemic. Costs associated with in person meetings were inevitably down, although the technical costs of running our 2021 annual conference online were significantly increased. Membership remained fairly stable which is both a reflection of the loyalty of members, as well as the opportunities provided to exchange ideas, access high-quality information advice and read about current research in the Journal. Financially we performed better than our forecasted loss of £9,000, ending the year with a small surplus of £324. However, we are aware that going forward, the costs of in-person meetings, alongside our commitment to support and enhance our digital communications, will inevitably feature in our strategic discussion in December. Moreover, the Society currently relies on extraordinary levels of voluntary effort and expertise, as my report testifies, placing mounting pressures and challenges on volunteers. To this end, we may need to add to our paid professional support which would obviously have financial implications for the Society that would need to be considered carefully at our strategy discussions in December, if not before.

Digital communications have been a priority for the OHS in keeping with the recommendations of our last strategic review in 2017 and the review of governance undertaken by a group of trustees and members across the Society. The pandemic has certainly accelerated some important developments that have facilitated more effective and varied channels of communication and sharing information which has facilitated more opportunities for members to express their views and influence the Society. These have been achieved through a major re-vamp of the website and the introduction of a number of tools and features, including an OHS blog, a regular multimedia article with the capacity to include audio-visual material and, in conjunction with the Oral History Journal, the introduction of online reviews and articles. The website's 4,000 or so hits per month is testimony to the wealth of updated information it now contains. For example, features on both archiving and remote interviewing have been added and have proved popular landing points. The numbers of newsletter subscribers and Facebook followers has remained stable this year, but our Twitter followers have continued to increase on average by 52 followers per month since 2019. Access to the website is currently free to both members and non-members and, whilst we will continue to support the wider oral history community, some consideration of the respective benefits to members and non-members will form an important part of our strategic discussion in December.

In addition to the new Journal features of the website, the Oral History Journal published two issues in spring and autumn 2021 with a wonderful range of articles from international settings. Like other groups in the Society, editors have continued to meet online and have also benefitted from international participation. On behalf of the Society, I would like to offer our sincere thanks to Cynthia Brown, who resigned as editor of the Current British Work section of the journal which has been a go-to section for keeping in touch with current projects.

THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2021

The idea of Special Interest Groups (SIGs) were conceived at the strategy weekend in 2014 and are now a flourishing and integral feature of the Society's activities. The importance of creating a space for groups to emerge organically out of members' interests was highlighted again this year with the creation of a SIG in Archives and Oral History. The range of events run this year across all our SIGs give a flavour of their dynamism and vitality. These have included 'The Performing Oral History Symposium' (Creative Oral History), 'More than Weather' (Environment and Climate Change) 'Corridor Conversations' (Higher Education) and 'LGBTQ people in Ukraine and Russia, past and present' (LGBTQ).

The Regional Network provides another opportunity to hear from oral historians across the UK, spanning twelve regions with 34 representatives from museums, universities, community organisations and libraries, as well as freelance oral historians. I'd like to pay special tribute to Juliana Vandegrift who stood down as Coordinator of the Network after eleven years. In addition to its annual meeting, the Network has hosted a series of monthly (virtual) drop-in sessions, on various topics, including one on recording traumatic and distressing memories that originated in a post on groups.io and attracted considerable interest. Members wanting to learn more about the Network are encouraged to look at the website for more information, including an interactive map and some contact details.

In addition to information and advice offered via the website and groups.io, a formal programme of training in oral history is conducted in collaboration with National Life Stories and the British Library. This year the training groups have delivered 84 courses to 652 people. The vast majority of courses were delivered online, which had the advantage of attracting both a strong contingent of overseas participants and some from the UK who were unable to travel for different reasons. Apart from the general introductory courses, courses on archiving, transcript to script, palliative care, project management and an introduction to GDPR for oral historians all featured in this year's offering.

One of our most important roles as a learned society is to defend and support oral history and oral historians, particularly in organisations and departments that are threatened with closure and individuals with redundancy or where funding is at risk. The Society has made a number of written interventions with varying success. Whatever the outcome, it is important for the OHS to lobby through our networks and support those colleagues and members of the wider oral history community, both in the UK and overseas.

In the aftermath of the George Floyd murder, the Society, like many other organisations and bodies, has initiated discussions on diversity and inclusivity. This year we have given consideration to the advertising of trustee vacancies and to developing relationships with groups through a series of 'in dialogue' events. The first was with Southall Black Sisters and others are planned with The Black Cultural Archive and The George Padmore Institute. The intention to increase and diversify our membership will be a key theme in our strategic discussions in December.

I began my report with a reference to the efforts of our volunteers over what is almost half a century. In this respect, the Society will be awarding three long standing members of the OHS, Alan Dein, Graham Smith and Robert Wilkinson, with life memberships at this year's Annual General Meeting to be held during our annual conference. On behalf of the Society, I'd also like to thank Fiona Cosson and Kate Melvin who resigned this year as Trustees after many years of service.

THE ORAL HISTORY SOCIETY
CHAIRMAN'S REPORT
FOR THE YEAR ENDED 31 DECEMBER 2021

I have not attempted to name all those individuals responsible for the Society's extraordinary range of initiatives and activities this year. However, to all my fellow officers, trustees, regional networkers and SIG members, as well as to those responsible for membership, finance, appointments and training, and to all those members who have maintained their loyalty to the organisation during difficult times, I offer an enormous thank you! I look forward to joining you in our 50th birthday celebrations next year.

John Gabriel, Chair

THE ORAL HISTORY SOCIETY
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2021

The trustees present their report with the financial statements of the charity for the year ended 31 December 2021. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

The Oral History Society (OHS), founded in 1973, is a national charity dedicated to the collection and preservation of oral history. It aims to offer both encouragement and practical advice to those conducting oral history, through its training courses run in conjunction with the British Library National Sound Archive, a yearly conference, and the twice-yearly publication of its journal Oral History. From the first edition Oral History has also provided a forum for oral historians to discuss the methods and challenges involved in the collection, interpretation and dissemination of oral testimonies. The journal has long maintained a news section that includes reports from community projects as well as a reviews section. This reflects the Society's policy of representing oral historians no matter where they work whether it is in education, community organisations or the media.

Activities

Current activities include jointly running a training programme with National Life Stories at the British Library, supporting over 40 experienced oral historians as locally based Regional Networkers - a point of contact for anyone interested in oral history; offering technical, legal and ethical advice; providing information on the funding of oral history work; and publishing two editions of the journal Oral History each year. Members also receive a free e-newsletter several times a year with briefings and news items.

Additional objectives and activities

A key structure of the Society is the Regional Network consisting of oral historians who offer a first point of contact in localities throughout Britain and Northern Ireland. The Trustees' sub-committees reflect priority areas and include a Nominations Committee, Trainers Group and an Archives Sub-Committee. The journal has its own Editorial Committee. There are a number of Special Interest Groups which are a recent innovation of the Society, in response to increasing interest among members for ways to develop networks and facilitate discussion and activities with others who share common interests and concerns.

There are currently the following Special Interest Groups:

- Schools and Young People
- Higher Education
- Environment and Climate Change
- Migration
- Psycho-Social Therapies and Care Environments
- Lesbian, Gay Bisexual, Transgender and Queer (LGBTQ)
- The Creative SIG

Public benefit

The Trustees confirm that they have complied with the duty in section 4 of the Charities Act 2011 to have due regard to public benefit guidance published by the Commission in determining the activities undertaken by the Charity.

THE ORAL HISTORY SOCIETY
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2021

FINANCIAL REVIEW

Financial position

The board of trustees is satisfied that the charity's assets in each fund are available and adequate to fulfil its obligations in respect of each fund.

The financial statements have been prepared implementing the Charities Act 2011 and the Charities Financial Reporting Standard SORP FRS 102. As stated in the introduction to this report, the trustees consider the financial performance by the charity during the year to have been satisfactory.

The Statement of Financial Activities show incoming resources for the year of £49,247 (prior year £41,320) and outgoing resources of £48,923 (prior year £36,368), making a net overall surplus of £324 (prior year £4,952). Free unrestricted reserves amounted to £96,082 (prior year £95,758).

Reserves policy

It was agreed that unrestricted financial reserves should be maintained at no less than half average expenses of the previous financial year. The trustees are confident the charity has sufficient unrestricted reserves.

FUTURE PLANS

The trustees review the aims, objectives and activities of the charity on a regular basis. They look at what the charity has achieved and the outcomes of its work in the reporting period. The trustees report on the success of each key activity. This can be seen on the Oral history web site www.ohs.ac.uk. The review also helps the trustees ensure the Society's aims and objectives and in planning its future activities. In particular the trustees consider how planned activities will contribute to the aims and objectives that have been set.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes an unincorporated charity. Details can be seen on the OHS web site at www.ohs.ac.uk.

Trustee Selection

The Trustees meet four times a year. The Trustees are responsible for the governance of the Society and are elected at the Society's Annual General Meeting which is held at the Society's annual conference. Officers' positions of the Society include a Chair, Vice-Chair, Secretary and Treasurer who are also elected annually.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. For more information visit the OHS web site at www.ohs.ac.uk

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity number

0288805

THE ORAL HISTORY SOCIETY

REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2021

Principal address

Dept of History Royal Holloway
University of London
Egham Hill
Egham
TW20 0EX

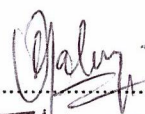
Trustees

Professor John Gabriel - **(Chair)**
Beth Thomas - **(Vice Chair)**
Dr Robert B Perks - **(Secretary)**
Titi Faluyi- (Treasurer)
Professor Joanna Bornat
Padmini Broomfield
Cynthia Brown
Verusca Calabria
Erin Farley
Dr Craig Fees
Emily Gibbs
Jenny Harding
Dr Cai Parry-Jones
Mary Stewart
Dr Amy Tooth-Murphy
Juliana Vandegrift
Dr Michelle Winslow
Dr Rob Perks
Dr Alan John Butler - Appointed on 10th July 2021
Mrs Jennifer Bethan Vickers - Appointed on 10th July 2021
Professor Malcolm Cowburn - Appointed on 10th July 2021
Fiona Cosson - Resigned 10th July 2021
Kate Melvin - Resigned 10th July 2021

Independent Examiner

Anwer Patel BA (Hons), BFP, FCA
ICAEW
Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

Approved by order of the board of trustees on 08/07/2022 and signed on its behalf by:

.....
Trustee :  Titi Faluyi

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
THE ORAL HISTORY SOCIETY**

Independent examiner's report to the trustees of The Oral History Society

I report to the charity trustees on my examination of the accounts of The Oral History Society (the Trust) for the year ended 31 December 2021.

Responsibilities and basis of report

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

I report in respect of my examination of the Trust's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

A. PATEL

Anwer Patel BA (Hons), BFP, FCA
ICAEW
Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

Date: 23/08/2022

THE ORAL HISTORY SOCIETY

**STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2021**

| | Notes | 31.12.21 Unrestricted fund £ | 31.12.20 Total funds £ |
|------------------------------------|-------|---------------------------------------|---------------------------------|
| INCOME AND ENDOWMENTS FROM | | | |
| Donations and legacies | 2 | 2,239 | 2,465 |
| Other trading activities | 3 | 46,283 | 38,011 |
| Investment income | 4 | 725 | 844 |
| Total | | <u>49,247</u> | <u>41,320</u> |
| EXPENDITURE ON | | | |
| Raising funds | | 40,288 | 26,433 |
| Charitable activities | | | |
| General | | 8,635 | 9,935 |
| Total | | <u>48,923</u> | <u>36,368</u> |
| NET INCOME | | <u>324</u> | <u>4,952</u> |
| RECONCILIATION OF FUNDS | | | |
| Total funds brought forward | | <u>95,758</u> | <u>90,806</u> |
| TOTAL FUNDS CARRIED FORWARD | | <u><u>96,082</u></u> | <u><u>95,758</u></u> |

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY
STATEMENT OF FINANCIAL POSITION
31 DECEMBER 2021

| | Notes | 31.12.21 Unrestricted fund £ | 31.12.20 Total funds £ |
|--|-------|---------------------------------------|---------------------------------|
| CURRENT ASSETS | | | |
| Debtors | 7 | 2,581 | 4,573 |
| Cash at bank | | <u>106,732</u> | <u>101,738</u> |
| | | 109,313 | 106,311 |
| CREDITORS | | | |
| Amounts falling due within one year | 8 | (13,231) | (10,553) |
| NET CURRENT ASSETS | | | |
| | | <u>96,082</u> | <u>95,758</u> |
| TOTAL ASSETS LESS CURRENT LIABILITIES | | | |
| | | 96,082 | 95,758 |
| NET ASSETS | | | |
| | | <u>96,082</u> | <u>95,758</u> |


The notes form part of these financial statements

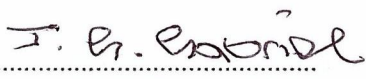
THE ORAL HISTORY SOCIETY


STATEMENT OF FINANCIAL POSITION - continued
31 DECEMBER 2021

| | | | |
|--------------------|---|----------------------|----------------------|
| FUNDS | 9 | | |
| Unrestricted funds | | <u>96,082</u> | <u>95,758</u> |
| TOTAL FUNDS | | <u><u>96,082</u></u> | <u><u>95,758</u></u> |

The financial statements were approved by the Board of Trustees and authorised for issue on 9th July 2022 and were signed on its behalf by:


Trustee : Titi Faluyi


Trustee : John Gabriel


Trustee : Robert B. Perks

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2021

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Going concern

Although COVID 19 is having a significant impact on the operations of the Society, the Trustees are confident that they have sufficient funds to cover for their charitable activities for the next twelve months. As a result of this, the accounts have been prepared on a going concern basis.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Donations are recognised when the charity has been notified in writing of both the amount and settlement date. In the event that a donation is subject to conditions that require a level of performance before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those condition is wholly within the control of the charity and is probable that those conditions will be fulfilled in the reporting period.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. 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.

Irrecoverable VAT is charged as cost against the activity for which the expenditure was incurred.

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.

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 DECEMBER 2021

1. ACCOUNTING POLICIES - continued

Debtors

Basic financial assets, including trade and other debtors, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Such assets are subsequently carried at amortised cost using the effective interest method, less any impairment.

Creditors

Basic financial liabilities, including trade and other creditors, loans from third parties and loans from related parties, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Such instruments are subsequently carried at amortised cost using the effective interest method, less any impairment.

Related Party Note

The charity discloses related party transactions in the notes to the financial statements.

2. DONATIONS AND LEGACIES

| | 31.12.21 | 31.12.20 |
|----------|--------------|--------------|
| | £ | £ |
| Gift aid | <u>2,239</u> | <u>2,465</u> |

3. OTHER TRADING ACTIVITIES

| | 31.12.21 | 31.12.20 |
|-------------------------|---------------|---------------|
| | £ | £ |
| Income from Conferences | 9,239 | - |
| Subscription Income | 30,389 | 31,966 |
| Sundries | 3,162 | 3,654 |
| Advertising | 261 | 72 |
| Other Generating Funds | 3,232 | 2,319 |
| | <u>46,283</u> | <u>38,011</u> |

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 DECEMBER 2021

4. INVESTMENT INCOME

| | 31.12.21 | 31.12.20 |
|--------------------------|------------|------------|
| | £ | £ |
| Deposit account interest | <u>725</u> | <u>844</u> |

5. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 December 2021 nor for the year ended 31 December 2020.

Trustees' expenses

| | 31.12.21 | 31.12.20 |
|--------------------|--------------|--------------|
| | £ | £ |
| Trustees' expenses | <u>1,056</u> | <u>1,493</u> |

All expenses incurred in the year were solely for the travelling and training purposes.

6. KEY MANAGEMENT PERSONNEL

The Trust considers its key management personnel comprise of the trustees.

7. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

| | 31.12.21 | 31.12.20 |
|--------------------------------|--------------|--------------|
| | £ | £ |
| Trade debtors | 1,814 | 4,295 |
| Prepayments and accrued income | <u>767</u> | <u>278</u> |
| | <u>2,581</u> | <u>4,573</u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2021**

8. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

| | 31.12.21 | 31.12.20 |
|-----------------|-----------------|---------------|
| | £ | £ |
| Trade creditors | 1,900 | 2,821 |
| Other creditors | 11,331 | 7,732 |
| | <u>13,231</u> | <u>10,553</u> |

9. MOVEMENT IN FUNDS

| | At 1/1/21 | Net movement in funds | At 31/12/21 |
|---------------------------|---------------|-----------------------------|----------------|
| | £ | £ | £ |
| Unrestricted funds | | | |
| General fund | 95,758 | 324 | 96,082 |
| | <u>95,758</u> | <u>324</u> | <u>96,082</u> |

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

| | Incoming resources | Resources expended | Movement in funds |
|---------------------------|-----------------------|-----------------------|----------------------|
| | £ | £ | £ |
| Unrestricted funds | | | |
| General fund | 49,247 | (48,923) | 324 |
| | <u>49,247</u> | <u>(48,923)</u> | <u>324</u> |

Comparatives for movement in funds

| | At 1/1/20 | Net movement in funds | At 31/12/20 |
|---------------------------|---------------|-----------------------------|----------------|
| | £ | £ | £ |
| Unrestricted funds | | | |
| General fund | 90,806 | 4,952 | 95,758 |
| | <u>90,806</u> | <u>4,952</u> | <u>95,758</u> |

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2021**

9. MOVEMENT IN FUNDS - continued

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

| | Incoming resources £ | Resources expended £ | Movement in funds £ |
|---------------------------|----------------------------|----------------------------|---------------------------|
| Unrestricted funds | | | |
| General fund | 41,320 | (36,368) | 4,952 |
| | <u> </u> | <u> </u> | <u> </u> |
| TOTAL FUNDS | <u>41,320</u> | <u>(36,368)</u> | <u>4,952</u> |

10. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 December 2021.

THE ORAL HISTORY SOCIETY

**DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2021**

| | 31.12.21 | 31.12.20 |
|---------------------------------------|----------|----------|
| | £ | £ |
| INCOME AND ENDOWMENTS | | |
| Donations and legacies | | |
| Gift aid | 2,239 | 2,465 |
| Other trading activities | | |
| Income from Conferences | 9,239 | - |
| Subscription Income | 30,389 | 31,966 |
| Sundries | 3,162 | 3,654 |
| Advertising | 261 | 72 |
| Other Generating Funds | 3,232 | 2,319 |
| | 46,283 | 38,011 |
| Investment income | | |
| Deposit account interest | 725 | 844 |
| | 49,247 | 41,320 |
| EXPENDITURE | | |
| Raising donations and legacies | | |
| Subscription Services | 6,819 | 6,091 |
| Printing and Publishing | 17,972 | 17,116 |
| Conference Costs | 12,927 | 1,697 |
| Training | - | 58 |
| Website | 2,570 | 1,471 |
| | 40,288 | 26,433 |
| Charitable activities | | |
| Stationary and Printing | 165 | 386 |
| Bank Charges | 473 | 470 |
| Sundries | - | 242 |
| Administrator | 567 | 1,166 |
| Special Interest Group | - | 425 |
| Video Conferencing | 288 | 168 |
| | 1,493 | 2,857 |

This page does not form part of the statutory financial statements

THE ORAL HISTORY SOCIETY

**DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2021**

| | 31.12.21 | 31.12.20 |
|----------------------------|---------------|----------|
| | £ | £ |
| Support costs | | |
| Governance costs | | |
| Trustees' expenses | 1,056 | 1,493 |
| Accountancy and legal fees | 1,516 | 1,520 |
| Bookkeeping | 4,570 | 4,065 |
| | <hr/> | <hr/> |
| | 7,142 | 7,078 |
| | <hr/> | <hr/> |
| Total resources expended | 48,923 | 36,368 |
| | <hr/> | <hr/> |
| Net income | 324 | 4,952 |
| | <hr/> | <hr/> |

This page does not form part of the statutory financial statements

THE ORAL HISTORY SOCIETY

England & Wales - Charity number 288805

Accounts

REGISTERED CHARITY NUMBER: 0288805

**REPORT OF THE TRUSTEES AND
FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2020
FOR
THE ORAL HISTORY SOCIETY**

Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

THE ORAL HISTORY SOCIETY

CONTENTS OF THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2020

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THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2020

My report last year began with a note about COVID 19 and its impact on the work of the Society. This time last year not many of us, I suspect, were expecting to spend the next twelve months in varying degrees of lockdown. During 2020 a risk assessment of the impact of the pandemic on the Society's business was a standing item at the Officers meetings on 17 March, 15 April, 2 June, 29 June, 24 July, 3 September, 13 and 20 October, and 17 November. Overall, the Society has adjusted well to the challenges posed by the pandemic. The main risks i.e. those associated with the postponement of the annual conference and replacing face to face events meetings discussions using online platforms etc. were discussed at the officers group in April 2020 and considered and actions agreed at a meeting of the Trustees in May 2020 (see minutes). The organisation agreed to run meetings virtually on Zoom and purchased a number of licences to allow committees, groups, etc. to run events, meetings, etc. as they would have in normal circumstances. A digital strategy group was established to explore additional and enhanced ways of communicating. The annual Conference, which was to have been held in Bournemouth in July 2020 was postponed until 2021, but it was agreed to run a virtual AGM. It was also agreed that training would be piloted remotely in order to ensure ongoing support for participants and financial continuity for trainers. Advice on remote interviewing during covid was provided on the OHS website. All these actions were considered in terms of costs and subsequently monitored. So, from April onwards, we have held virtual meetings throughout this period and communicated with our members and the wider oral history community via our website, monthly newsletters, and groups.io (see below).

It has been an extremely difficult and often painful time for many, including colleagues working as freelancers and in the public, charitable and higher education sectors. In higher education, for example, a number of universities have announced closures and redundancies that have directly impacted on oral historians and threatened our interests and objectives. I have sent a number of letters on behalf of the Society, and in case of the University of East London, committed us to a number of measures of non-collaboration. During the course of the year, we also witnessed the murder of George Floyd in the US which provoked widespread debate and soul-searching across educational and cultural institutions as to how we can better address the wider cultural issues raised by his murder. In this regard we are looking closely at our appointments policies and processes and are discussing how we might organise one or more round table discussions on diversity, including one led by prominent Black Asian and Minority Ethnic oral historians and representatives of BAME organisations. The purpose of this would be to reflect on current practices and consider what further we can do as an organisation. These interventions beg a important and overdue discussion of how we engage with such wider issues, campaigns and stakeholders.

Our current financial position to an extent reflects the significant changes brought about by the pandemic. Overall, the Society's accounts ended 2020 just over £5K in surplus on the previous year, bringing our reserves to a total of just under £96K, a fairly secure position given current circumstances. Underneath the headline figures, however, the postponement of the annual conference impacted on both costs and income sides of the balance sheet. The enforced reduction in travel costs was a saving, but the loss of face-to-face training impacted on the returns from our training programme (see below). More worryingly, the year has seen a decline in membership, with both individual and institutional subscriptions down by around 9% and 45% respectively. We attribute this in part to the impact of the pandemic, that is loss of earnings and cutbacks in institutional and project funding. However, these membership trends, though exacerbated by COVID 19, pre-date the pandemic. We recognise the need to address these trends as well as consider alternative ways of generating income. Whilst we can absorb a projected loss of £10K in 2021, we know this is not sustainable in the medium and long term.

THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2020

The focus of our strategic planning this year has been very much on our digital strategy, building our capacity to meet online via zoom, which has now become the norm not only for our Trustee meetings but also Special Interest Groups (SIGs), the Regional Network, the Training Group, the Journal editorial board and indeed for members, as we experimented at last year's AGM. A suite of groups.io email discussion groups has now been rolled out to aid communication and discussion across the Society. A tremendous amount of work has gone into rebuilding and transforming our website, making navigation much easier, less text-based, and more user-driven. Our commitment to promote debate and discussion amongst members is behind the decision to launch a blog on our website and align it more closely with other groups within the organisation. We are particularly grateful to Beth Thomas for her work on the website which will be launched in April 2021.

Many of our SIGs have held some exciting and well-attended events despite the constraints of lockdown. Particularly striking were the series of talks and events organised by our relatively new Creative Practice SIG, the impressive seminar series run by our LGBTQ SIG and the growing attendance and social media interest in our newly-created Higher Education SIG. Many thanks are due to Craig Fees for his role supporting and encouraging SIG activities as well as his work promoting wider participation in the Society through groups.io

Our Regional Network held its annual event on zoom, choosing as its focus oral history during COVID, which included presentations on our new digital strategy and this was followed by a workshop on the technical as well as ethical and methodological issues associated with remote interviewing. The latter has proved to be an important focus of debate and has been raised in the Committee and the Higher Education SIG, where we are hoping to pursue the issue. In common with other events, feedback from the Regional Network attendees highlighted the benefits of online meetings from the point of view of costs, accessibility and helping to reverse climate change.

Despite lockdown, the Oral History Journal editorial board and team were able to continue to work remotely during the pandemic and both issues of the journal for autumn 2020 and spring 2021 were published. The latter was the largest issue to date, running to 142 pages and included an excellent mix of articles as well as the hugely informative and interesting sections on current British and International work. We are looking forward to strengthening the links between the Journal and our website which will include blogs from current British work and online book and media reviews, which will help grow our national and international profile.

Our joint training programme with National Life Stories and the British Library was initially badly impacted by Covid, but, led by Camille Johnston, the training team quickly reversioned almost all the courses for online delivery via zoom over two half-days and with fewer attendees. The trainers held several zoom meetings to share knowledge and skills around remote interviewing technology and online teaching. By the end of 2020 a remarkable 60 courses had been held involving 480 people, including 35 courses tailored for individual projects. One silver lining of the pandemic has been that online training has attracted many more international participants (8%) and has also enabled people to attend from more geographically remote parts of the UK who might not otherwise have had the funding to do so.

Over the last twelve months we have strengthened our links with the Historical Association and school teachers. Julia Letts ran a seminar for the HA on oral history in schools as a result of which the HA have agreed in principle to include oral history in their initial teacher training programme. The current plan is for the OHS to fund two films to be used in teacher training. This is a really important stepping stone in terms of embedding oral history in teacher education and we are indebted to Julia Letts, Kate Melvin and Helen Lloyd for their efforts and success in this area of our work.

THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2020

As mentioned above our annual conference on the Media, planned for 2020 was postponed until 2021 due to COVID 19, but thanks to Polly Owen's hard work behind the scenes we are now eagerly looking forward to our first online conference in July! There is an exciting range of presentations and some outstanding plenary speakers, for which thanks are due to Fiona Cosson and the organising group. We will learn from our experience of this year's conference for next year, which will be on the theme of 'Home' (agreed, coincidentally, prior to lockdown) which could see an virtual element running alongside what for most of us will be a welcome return to a face to face event, at least we hope!

Over the course of the year, we have said goodbye to a number of trustees. Robert Wilkinson joined the committee in 1984 and made an enormously important all-round contribution to the development of the Society, not least as longstanding treasurer. Rob's successor as Treasurer for the last five years, Nick Chalmers, also retired and we will always be indebted to him for bringing clarity and common sense to our discussions on finance. We shall also miss Shelley Trower, who joined the Committee in 2008 and played an important role in the HE group and sat on the organising groups of a number of conferences. Finally, we have said goodbye to Sarah Ellis, who worked so effectively on the OHS archive at the BL and as our data protection officer, and who left us after only two years on the Committee. Our thanks and best wishes go to them all. And our condolences go to the families and friends of former Welsh MP, human rights activist and oral historian, Hywel Francis, who sadly died last year. In terms of new Committee members, we were delighted to welcomed Titi Faluyi as our new Treasurer and we hope to fill two further vacancies in the coming months. Finally, I cannot conclude without expressing my thanks to our part-time staff and my enormous appreciation for the brilliant (voluntary) effort of our Officers, Committee, SIGs, Regional Networkers and to our wider membership for their contribution to the Oral History Society and movement during what has been a challenging year.

John Gabriel, Chair (on behalf of the Trustees)

THE ORAL HISTORY SOCIETY

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 Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

The Oral History Society (OHS), founded in 1973, is a national charity dedicated to the collection and preservation of oral history. It aims to offer both encouragement and practical advice to those conducting oral history, through its training courses run in conjunction with the British Library National Sound Archive, a yearly conference, and the twice-yearly publication of its journal Oral History. From the first edition Oral History has also provided a forum for oral historians to discuss the methods and challenges involved in the collection, interpretation and dissemination of oral testimonies. The journal has long maintained a news section that includes reports from community projects as well as a reviews section. This reflects the Society's policy of representing oral historians no matter where they work whether it is in education, community organisations or the media.

Activities

Current activities include jointly running a training programme with National Life Stories at the British Library, supporting over 40 experienced oral historians as locally based Regional Networkers - a point of contact for anyone interested in oral history; offering technical, legal and ethical advice; providing information on the funding of oral history work; and publishing two editions of the journal Oral History each year. Members also receive a free e-newsletter several times a year with briefings and news items.

Additional objectives and activities

A key structure of the Society is the Regional Network consisting of oral historians who offer a first point of contact in localities throughout Britain and Northern Ireland. The Trustees' sub-committees reflect priority areas and include a Nominations Committee, Trainers Group and an Archives Sub-Committee. The journal has its own Editorial Committee. There are a number of Special Interest Groups which are a recent innovation of the Society, in response to increasing interest among members for ways to develop networks and facilitate discussion and activities with others who share common interests and concerns.

There are currently the following Special Interest Groups:

- Schools and Young People
- Higher Education
- Environment and Climate Change
- Migration
- Psycho-Social Therapies and Care Environments
- Lesbian, Gay Bisexual, Transgender and Queer (LBGTQ)
- The Creative SIG

THE ORAL HISTORY SOCIETY

REPORT OF THE TRUSTEES FOR THE YEAR ENDED 31 DECEMBER 2020

OBJECTIVES AND ACTIVITIES

Public benefit

The Trustees confirm that they have complied with the duty in section 4 of the Charities Act 2011 to have due regard to public benefit guidance published by the Commission in determining the activities undertaken by the Charity.

FINANCIAL REVIEW

Financial position

The board of trustees is satisfied that the charity's assets in each fund are available and adequate to fulfil its obligations in respect of each fund.

The financial statements have been prepared implementing the Charities Act 2011 and the Charities Financial Reporting Standard SORP FRS 102. As stated in the introduction to this report, the trustees consider the financial performance by the charity during the year to have been satisfactory.

The Statement of Financial Activities show incoming resources for the year of £41,320 (prior year £77,795) and outgoing resources of £36,368 (prior year £71,887), making a net overall surplus of £4,952 (prior year £5,908). Free unrestricted reserves amounted to £95,758 (prior year £90,806).

Reserves policy

It was agreed that unrestricted financial reserves should be maintained at no less than half average expenses of the previous financial year.

FUTURE PLANS

The trustees review the aims, objectives and activities of the charity on a regular basis. They look at what the charity has achieved and the outcomes of its work in the reporting period. The trustees report on the success of each key activity. This can be seen on the Oral history web site www.ohs.ac.uk. The review also helps the trustees ensure the Society's aims and objectives and in planning its future activities. In particular the trustees consider how planned activities will contribute to the aims and objectives that have been set.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes an unincorporated charity. Details can be seen on the OHS web site at www.ohs.ac.uk.

Trustee Selection

The Trustees meet four times a year. The Trustees are responsible for the governance of the Society and are elected at the Society's Annual General Meeting which is held at the Society's annual conference. Officers' positions of the Society include a Chair, Vice-Chair, Secretary and Treasurer who are also elected annually.

Risk management

The trustees have a duty to identify and review the risks to which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error. For more information visit the OHS web site at www.ohs.ac.uk

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity number

0288805

THE ORAL HISTORY SOCIETY
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2020

Principal address

Dept of History Royal Holloway
University of London
Egham Hill
Egham
TW20 0EX

Trustees

John Gabriel - **(Chair)**
Beth Thomas - (Vice Chair)
Robert Perks - (Secretary)
Nick Chalmers (Treasurer) - resigned 4th July 2020
Titi Faluyi- (Treasurer) - Appointed 11th September 2020
Joanna Bornat
Padmini Broomfield
Cynthia Brown
Verusca Calabria
Robert Wilkinson - resigned 31st December 2020
Sarah Ellis - resigned 11th December 2020
Fiona Cosson
Erin Farley
Craig Fees
Emily Gibbs
Jenny Harding
Kate Melvin
Cai Parry-Jones
Graham Smith
Mary Stewart
Amy Tooth-Murphy
Juliana Vandegrift
Michelle Winslow

Independent Examiner

Anwer Patel BA (Hons), BFP, FCA
ICAEW
Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

Approved by order of the board of trustees on 11th June 2021 and signed on its behalf by:

.....
Trustee: Titi Faluyi

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
THE ORAL HISTORY SOCIETY**

Independent examiner's report to the trustees of The Oral History Society

I report to the charity trustees on my examination of the accounts of The Oral History Society (the Trust) for the year ended 31 December 2020.

Responsibilities and basis of report

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

I report in respect of my examination of the Trust's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

A. Patel

Anwer Patel BA (Hons), BFP, FCA
ICAEW
Prestons & Jacksons Partnership LLP
364 - 368 Cranbrook Road
Ilford
Essex
IG2 6HY

Date: 26/07/2021

THE ORAL HISTORY SOCIETY

**STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2020**

| | Notes | 31.12.20 Unrestricted fund £ | 31.12.19 Total funds £ |
|------------------------------------|-------|---------------------------------------|---------------------------------|
| INCOME AND ENDOWMENTS FROM | | | |
| Donations and legacies | 2 | 2,465 | 1,883 |
| Other trading activities | 3 | 38,011 | 74,863 |
| Investment income | 4 | 844 | 1,049 |
| Total | | 41,320 | 77,795 |
| EXPENDITURE ON | | | |
| Raising funds | | 26,433 | 61,545 |
| Charitable activities | | | |
| General | | 9,935 | 10,342 |
| Total | | 36,368 | 71,887 |
| NET INCOME | | 4,952 | 5,908 |
| RECONCILIATION OF FUNDS | | | |
| Total funds brought forward | | 90,806 | 84,898 |
| TOTAL FUNDS CARRIED FORWARD | | 95,758 | 90,806 |

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY
STATEMENT OF FINANCIAL POSITION
31 DECEMBER 2020

| | Notes | 31.12.20 Unrestricted fund £ | 31.12.19 Total funds £ |
|--|-------|---------------------------------------|---------------------------------|
| CURRENT ASSETS | | | |
| Debtors | 7 | 4,573 | 3,422 |
| Cash at bank | | 101,738 | 96,202 |
| | | <u>106,311</u> | <u>99,624</u> |
| CREDITORS | | | |
| Amounts falling due within one year | 8 | (10,553) | (8,818) |
| | | <u>95,758</u> | <u>90,806</u> |
| NET CURRENT ASSETS | | | |
| | | <u>95,758</u> | <u>90,806</u> |
| TOTAL ASSETS LESS CURRENT LIABILITIES | | | |
| | | <u>95,758</u> | <u>90,806</u> |
| NET ASSETS | | | |
| | | <u><u>95,758</u></u> | <u><u>90,806</u></u> |

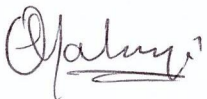
The notes form part of these financial statements

THE ORAL HISTORY SOCIETY

STATEMENT OF FINANCIAL POSITION - continued
31 DECEMBER 2020

| | | | |
|--------------------|---|----------------------|----------------------|
| FUNDS | 9 | | |
| Unrestricted funds | | <u>95,758</u> | <u>90,806</u> |
| TOTAL FUNDS | | <u><u>95,758</u></u> | <u><u>90,806</u></u> |

The financial statements were approved by the Board of Trustees and authorised for issue on 11th June 2021 and were signed on its behalf by:



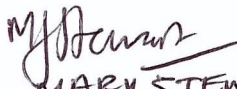
TITI FALINI

Trustee



JOHN GABRIEL

Trustee



MARY STEWART

Trustee

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2020

1. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Going concern

Although COVID 19 is having a significant impact on the operations of the Society, the Trustees are confident that they have sufficient funds to cover for their charitable activities for the next twelve months. As a result of this, the accounts have been prepared on a going concern basis.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Donations are recognised when the charity has been notified in writing of both the amount and settlement date. In the event that a donation is subject to conditions that require a level of performance before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those condition is wholly within the control of the charity and is probable that those conditions will be fulfilled in the reporting period.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. 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.

Irrecoverable VAT is charged as cost against the activity for which the expenditure was incurred.

Related party exemption

The charity has taken advantage of exemption, under the terms of Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland', not to disclose related party transactions with wholly owned subsidiaries within the group.

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.

