

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

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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.

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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.

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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
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Essex
IG2 6HY

Date:26/07/2021.....

THE ORAL HISTORY SOCIETY

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 DECEMBER 2020

		31.12.20 Unrestricted fund £	31.12.19 Total funds £
INCOME AND ENDOWMENTS FROM	Notes		
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

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

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY

STATEMENT OF FINANCIAL POSITION - continued
31 DECEMBER 2020

FUNDS	9		
Unrestricted funds		95,758	90,806
TOTAL FUNDS		95,758	90,806

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 FALUY

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.

