

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
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THE ORAL HISTORY SOCIETY

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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
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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
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Date: 12/08/2024

THE ORAL HISTORY SOCIETY

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2023

		31.12.23	31.12.22
		Unrestricted	Total
		fund	funds
		£	£
INCOME AND ENDOWMENTS FROM	Notes		
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

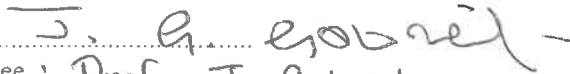
The notes form part of these financial statements

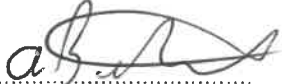
THE ORAL HISTORY SOCIETY


STATEMENT OF FINANCIAL POSITION 31 DECEMBER 2023

		31.12.23 Unrestricted fund £	31.12.22 Total funds £
CURRENT ASSETS	Notes		
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	9		
Unrestricted funds		104,633	104,051
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>

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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>
TOTAL FUNDS	<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>
TOTAL FUNDS	<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>
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 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
	<hr/>	<hr/>	<hr/>
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.