

**GLOUCESTERSHIRE FAMILY HISTORY SOCIETY
CHARITY NUMBER 296959**

REPORT AND ACCOUNTS

YEAR ENDED 31 MARCH 2025



GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

LEGAL AND ADMINISTRATIVE INFORMATION

CHARITY NUMBER 296959 CHARITIES ACT 2011

TRUSTEES

Amelia Bennett
David Howells
Vicky Thorpe
Elaine Schollar
David Poole
John Loosley
Elizabeth Jack

EXECUTIVE COMMITTEE

Amelia Bennett: Chair
Elaine Schollar: Treasurer
VACANT: Secretary
David Howells: Committee Member
Vicky Thorpe: Committee Member
David Poole: Committee Member
Colin Maher: Committee Member
Tracy Barnett: Committee Member
Sue Woodward: Committee Member
Paul Evans: Committee Member
Sue Ross: Committee Member
Dave Carlile: Committee Member

BANKERS

National Westminster Bank PLC
21 Eastgate Street
Gloucester
GL1 1NH

PayPal (Europe) S.à r.l. et Cie, S.C.A.
22-24 Boulevard Royal
L-2449 Luxembourg

INVESTMENT MANAGERS

COIF Charity Funds
Senator House
85 Queen Victoria Street
London
EC4V 4ET

Hampshire Trust Bank
55 Bishopsgate
London
EC2N 3AS

CORRESPONDENCE ADDRESS

Ms E P Schollar
Family History Centre, Heritage Hub
Clarence Row, Alvin Street
Gloucester
GL1 3AH

WEBSITE

www.gfhs.org.uk

INDEPENDENT EXAMINER

Miss S.E. Brown FCA, CTA
2 Chancel Way
Charlton Kings
Cheltenham
Gloucestershire
GL53 7RR

GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

TRUSTEES' ANNUAL REPORT

FOR THE YEAR ENDED 31 MARCH 2025

The Trustees present their report and accounts for the year ended 31 March 2025.

Structure, governance and management

The Gloucestershire Family History Society (GFHS) is currently governed by a constitution drawn up in 1990 as amended in the years 1992, 2000, 2001, 2013, 2019 and 2021. It is a Charity registered as charity number 296959. For the year ending 31/3/2025, GFHS was administered by an Executive Committee which comprised the Honorary Officers (Chair, Treasurer and Secretary [vacant]) and ten other Executive Committee members, all of whom were elected at the 2024 AGM. The Committee met monthly during the year, with meetings also attended by a representative of Gloucestershire Archives. The Trustee Board, which comprised the Honorary Officers of the Executive Committee (Chair, Treasurer and Secretary [vacant]) plus five additional Trustees, met quarterly, and, working closely with the Executive Committee, provided the overall strategic direction for the Society.

Objectives and activities

The objectives of the charity are to promote and encourage the public study of British Family History, genealogy, heraldry and local history with particular reference to Gloucestershire, and the preservation, security and accessibility of archival material.

GFHS's Family History Centre, which is based at the Heritage Hub in Gloucester, is staffed by volunteers who provide help and advice to members and non-members who wish to trace their family histories, free of charge. GFHS relies heavily on the contribution of its volunteers, who run the Family History Centre, as well as those who carry out the many 'behind-the-scenes' administrative functions.

The Centre provides access to the internet with a suite of computers available for public use, with access to all of the main genealogy sites provided. The Centre also houses a well-stocked library and a shop, which sells books of local and genealogical interest, as well as CDs and maps.

The GFHS journal is available to members on a quarterly basis, either by post or via digital download from the website. The journals include articles and contributions from the members, and provide education, information and help for family history researchers. 'News from the Committee', an e-newsletter which is specifically for the GFHS volunteers, keeps them informed of events and important information, and is also a means of consulting the volunteers on important decisions affecting the Centre. A further monthly e-newsletter, available to both members and non-members who subscribe to receive it, provides information on events and updates on the activities of the Society.

GFHS also maintains a social media presence, both on Facebook and Bluesky, and has its own website, which is regularly updated. Talks and events are arranged and when possible, volunteers from GFHS attend fairs and events arranged by other Family History Societies and the Family History Federation (FHF).

GFHS supports Gloucestershire Archives in preserving and archiving historical local records, and is one of the partners of the Gloucestershire Heritage Hub, where the Family History Centre is based. GFHS has continued to build on the good relations with partners and colleagues in the Hub, as well as with other local organisations with similar interests.

GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

TRUSTEES' ANNUAL REPORT (cont.)

FOR THE YEAR ENDED 31 MARCH 2025

Achievements and performance

GFHS occupies a unit on the Heritage Hub/Gloucestershire Archives site. This is leased and licenced from Gloucestershire County Council and comprises a ground floor unit with access and facilities for people with disabilities. It is a modern and bright Family History Centre, attractive to members, volunteers and visitors alike.

Approximately 2,295 visitors and volunteers attended the Centre during the year, a monthly average of just over 190. (These are individual visits, not the number of individual users).

The proximity of the Family History Centre to the Gloucestershire Archives' (GA) search room has facilitated closer working and greater collaboration between the GA staff and the GFHS volunteers, and having the organisations with similar interests housed under one roof within the Hub, has been of benefit to a number of the visitors. Family History Centre volunteers often help Gloucestershire Archive visitors with aspects of their research, for example house history, or access to historic newspaper articles. This collaboration highlights that many aspects of our work are not mutually exclusive, and the profiles of both organisations have been raised accordingly.

GFHS also hosted a Gloucestershire Archives work experience student, and has continued to engage in other activities with the Archives. The monthly Saturday openings of the Heritage Hub to the general public, organised and facilitated by Gloucestershire Archives staff, continued throughout the year, and have continued to be popular and well-attended. The event in November 2024 saw GFHS take the lead in organising a family history fair, which proved to be very popular. A number of family history societies, heritage groups and other similar groups had stalls/exhibitions at the fair, and GFHS volunteers offered 'Getting Started'; 'Taking it Further'; and 'Breaking down Brickwalls' sessions. Information about a number of projects GFHS has either been involved in or led on was available (Westgate Street, Leases, BMD, Memorial Inscriptions and War Memorials), and the event included talks by Jo Teague and Dr Nick Barratt.

Other collaborations have included a number of joint in-person events at the Heritage Hub with the Friends of Gloucestershire Archives. During the year, textile historian Jo Teague talked about projects she has worked on which used archives as inspiration; Tony Conder gave a presentation on Gloucester's maritime history; Ross Campbell spoke about the history of the Regal cinema in Gloucester; and the MoD War Detectives gave a presentation about their work. All of these events proved popular and were well attended.

GFHS volunteers also attended a number of external events organised by other Societies and groups in 2024. These included the Pied Piper Classic Car Show at Highnam Court on 4 June; the Wiltshire Family History Society Family History Day in Swindon on 15 June; Gloucestershire Local Historical Association's Local History Day at Hartpury on 27 July; Oxfordshire's Family History Society's Family History Fair on 26 October; and the Family History Show in Malvern in March 2025.

GFHS volunteers were again involved in projects during the year, including the 'Stitching Lives Together' project run by Jo Teague. Six GFHS volunteers worked on this (mainly in May/June 2024), pulling together information about textile workers in Gloucester. Jo Teague used the research to inspire a series of textile installations in various venues in the city of Gloucester, including at the Heritage Hub in November, where she also spoke at GFHS's family history event about the project. GFHS volunteers also got involved in conducting research to contribute to the 'Gloucestershire Mariners' project being led by local historian Tony Conder. This work has continued into the current financial year, and the results should start to be showcased in the latter part of 2025.

GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

TRUSTEES' ANNUAL REPORT (cont.)

FOR THE YEAR ENDED 31 MARCH 2025

Achievements and performance (cont.)

Projects GFHS have previously been involved in, have also continued to be showcased. The illustrated wooden silhouettes, which formed part of Voices Gloucester's 'We Are Gathered Here' project, moved into Gloucester Cathedral in April 2024 before going back on display in St Nicholas's Church in Westgate Street in September as part of the city's Heritage Open Day events. The images, along with information drawn from the research conducted by GFHS volunteers, also went online as a digital display on the 'Voices Gloucester' website.

In addition to the in-person events, it was another successful year for GFHS's online Zoom talks, which were well attended. The monthly articles for 'Cotswold Life' have continued, and GFHS also continues to contribute to the quarterly Heritage Hub newsletter.

Back at the Centre, the update to the IT continued, and in December, following a review of the costs and an assessment of needs, the contract for the printer was not renewed and a new printer was acquired. Work continued on reviewing and updating the contents of the library; and further additions, both new publications and donated books, were added to the bookshop.

Volunteers helped numerous visitors with their family history research, with the GFHS Helpdesk kept busy. A dedicated group of volunteers continued their work transcribing and checking BMD records, and there are approximately 600,000 marriages, 855,000 births and 550,000 deaths on ww3.gloucestershire.gov.uk/bmd. All districts now have deaths up to 1945 on the website, which has recorded over four million hits.

The Memorial Inscriptions (MI) and burial index now includes all the MIs and burial lists that GFHS has, either in the library or on the PC's in the Family History Centre. There are now approximately 600,000 records included in the index, which has names, ages (where known), date of death or burial, place and a reference to where further information may be found. One significant addition has been the inclusion of the Stroud Cemetery records from 1856-2025 with over 15,000 entries giving names, ages, year and a reference. Work has continued into the current year, including that of recording the MIs of the large graveyard at Westbury on Severn. Some of this information has already been included in the indexes and is available to view at the FHC.

Membership – Another major undertaking during the year was the move to a dedicated membership database, Membermojo (MMJ), which followed extensive tests and trialing. GFHS went 'live' on MMJ in November 2024, a time deliberately chosen due to it generally being a quieter time of year for memberships. The transition went smoothly and has generally proven to be beneficial.

The number of members who paid for a subscription for the financial year 2024-2025 was 1,100.

Journal – The Society's journal continues to be issued to all members each quarter, in printed and on-line formats.

Registered charities are required to comply with statutory and Charity Commission Public Benefit requirements, and the Trustees believe that every activity undertaken meets the Charity Commission's guidance relating to this.

GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

TRUSTEES' ANNUAL REPORT (cont.)

FOR THE YEAR ENDED 31 MARCH 2025

Financial review

Policy on reserves:

The Trustees believe it necessary to maintain unrestricted funds for the following purposes:

- (a) To cover obligations to pay future rent and licence fee of the Family History Centre in the event of a fall in revenue income, and the expected increase in rent and utility costs;
- (b) to buy research material which may become available from time to time;
- (c) to support preservation of and access to records including transcription projects and preservation materials;
- (d) to renew and to buy further equipment to assist research and education;
- (e) to invest in improvements to the website and other technology to enable greater engagement with more members.

The Trustees believe that the current level of funds is adequate for these purposes.

The Society will need to maintain the reserves at or near the current level to fulfil its future obligations. Although the Society's funds are healthy, membership of family history societies continues to decline long term, and GFHS is no exception to this. The Trustees made the decision to re-invest £55,000, plus an additional £5,000 from the current bank account, into another Hampshire Trust one-year bond which was offering a favourable return. The Trustees will continue to keep income and expenditure under review during the coming year.

The Society's General Fund shows a surplus for the year of £1,473.67 which, when carried to reserves leaves a balance to carry forward of £88,713.39.

The Trustees declare that they have approved the Trustees' report above.

Signed on behalf of the charity's trustees:

Amelia Bennett
Chair

Elaine Schollar
Treasurer

16th August 2025

INDEPENDENT EXAMINER'S REPORT

TO THE TRUSTEES OF GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

I report on the accounts of the Charity for the year ended 31 March 2025, which are set out on pages 7 to 11.

Respective responsibilities of Trustees and Examiner

The charity's Trustees are responsible for the preparation of the accounts. The Trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the Charities Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Charities Act,
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the Charities Act, and
- to state whether particular matters have come to my attention.

Basis of Independent Examiner's report

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from the Trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair' view and the report is limited to those matters set out in the statement below.

Independent Examiner's statement

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

1. which gives me reasonable cause to believe that, in any material respect, the trustees have not met the requirements:
 - to keep proper accounting records in accordance with section 130 of the Charities Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirement of the Charities Act; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

S. E. Brown

S.E. Brown FCA, CTA

18 August 2025

2 Chancel Way
Charlton Kings
Cheltenham
Gloucestershire
GL53 7RR

GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

STATEMENT OF FINANCIAL ACTIVITIES

YEAR ENDED 31 MARCH 2025

GENERAL UNRESTRICTED FUND

RESOURCES EXPENDED			INCOMING RESOURCES		
	2025	2024		2025	2024
Charitable activities:			Incoming resources from generating funds:		
Family History Centre:			Voluntary income		
Rent	6,389.75	6,087.50	Subscriptions: Ordinary Membership	11,218.00	11,598.39
Telephone and Internet	2,529.37	2,317.96	Overseas Membership	1,192.00	1,274.45
Printing, postage and stationery	818.00	849.80			
IT consumables and software	339.33	335.01		12,410.00	12,872.84
Miscellaneous	133.10	192.81	Gift Aid	1,836.06	1,896.25
			Donations	1,595.22	1,645.70
	10,209.55	9,783.08	Legacy	2,667.00	-
				18,508.28	16,414.79
Cost of sales: publications	1,061.72	556.07	Activities for generating funds		
Journal printing	3,485.48	3,408.00	Advertising	56.25	90.00
Journal postage	2,275.99	2,326.24	Heritage Hub refreshments	770.00	572.20
Society publications and services	67.92	-	Sale of sweatshirts and polo shirts	-	19.62
Conferences and travel	335.80	220.50			
Meetings	1,054.18	889.00		826.25	681.82
Donations	-	-			
	18,490.64	17,182.89	Investment income		
			Interest	2,784.33	2,484.88
				2,784.33	2,484.88
Activities for generating funds:			Incoming resources from charitable activities:		
Heritage Hub refreshments	200.54	213.12	Sale of publications	1,817.55	1,038.26
	200.54	213.12	Society services and publications	1,473.85	1,349.20
				3,291.40	2,387.46
Governance Costs:			Other incoming resources		
Printing, postage and stationery	414.00	386.58	Internet royalties	405.01	488.74
Membership expenses	489.18	374.69		405.01	488.74
Federation Fees, Insurance and Subscriptions	826.81	837.23			
Independent Examiner's Fees	400.00	400.00			
Miscellaneous	281.29	219.04			
Bank and credit card charges	242.76	292.58			
Depreciation of fixed assets	2,996.38	597.45			
Loss on disposal of fixed assets	-	77.71			
	5,650.42	3,185.28			
TOTAL RESOURCES EXPENDED	24,341.60	20,581.29	TOTAL INCOMING RESOURCES	25,815.27	22,457.69
NET MOVEMENT OF FUNDS	1,473.67	1,876.40	NET MOVEMENT OF FUNDS	-	-
	£ 25,815.27	£ 22,457.69		£ 25,815.27	£ 22,457.69

RECONCILIATION OF FUNDS:

	2025	2024
Total funds brought forward at 1 April 2024	87,239.72	85,363.32
Net Movement of Funds	1,473.67	1,876.40
Total funds carried forward at 31 March 2025	£ 88,713.39	£ 87,239.72

GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

STATEMENT OF FINANCIAL ACTIVITIES

YEAR ENDED 31 MARCH 2025

RESTRICTED FUND

RESOURCES EXPENDED

	2025	2024
Charitable activities:		
'We Are Gathered Here' Project	0.00	1,500.00
TOTAL RESOURCES EXPENDED	0.00	1,500.00
NET MOVEMENT OF FUNDS	-	-
	£ 0.00	£ 1,500.00

INCOMING RESOURCES

	2025	2024
Incoming resources from generating funds:		
Grant	0.00	1,500.00
TOTAL INCOMING RESOURCES	0.00	1,500.00
NET MOVEMENT OF FUNDS	-	-
	£ 0.00	£ 1,500.00

RECONCILIATION OF FUNDS:

	2025	2024
Total funds brought forward at 1 April 2024	-	-
Net Movement of Funds	-	-
Total funds carried forward at 31 March 2025	£ -	£ -

GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

BALANCE SHEET

AS AT 31 MARCH 2025

	NOTE	2025	2024
FIXED ASSETS	2	8,516.65	10,911.21
CURRENT ASSETS			
Stock of books, CDs and maps		1,667.45	1,865.63
Debtors and Prepayments	3	2,450.90	4,125.39
Current Bank Accounts		13,849.25	13,430.66
COIF Charities Deposit Fund		8,880.39	8,461.22
Hampshire Trust Bank Bond		60,000.00	55,000.00
Cash in hand		43.00	43.00
TOTAL CURRENT ASSETS		86,890.99	82,925.90
CREDITORS: Amounts falling due within one year			
Creditors and accruals	4	792.25	772.39
Subscriptions received in advance		5,902.00	5,825.00
		6,694.25	6,597.39
NET CURRENT ASSETS		80,196.74	76,328.51
NET ASSETS		<u>£ 88,713.39</u>	<u>£ 87,239.72</u>
FUNDS OF THE CHARITY:			
GENERAL UNRESTRICTED FUND			
Balance 31 March 2025		<u>£ 88,713.39</u>	<u>£ 87,239.72</u>

Elaine Schollar
Treasurer
On behalf of the Trustees
16 August 2025

GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

NOTES TO THE ACCOUNTS

YEAR ENDED 31 MARCH 2025

1. ACCOUNTING POLICIES

Basis of accounting

These accounts have been prepared under the historical cost convention and in accordance with the Charities Statement of Recommended Practice (FRS 102).

Recognition of incoming resources

These are included in the Statement of Financial Activities when the charity becomes entitled to the resource, the trustees are virtually certain they will receive the resources and the monetary value can be measured with sufficient reliability.

Tax reclaims on donations, gifts and subscriptions

Gift Aid receivable is included in income when there is a valid declaration from the donor. Any Gift Aid amount recovered is considered to be part of that donation, gift or subscription.

Recognition of outgoing resources

Expenditure is generally recognised when a liability is incurred.

Stock

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

Debtors

Debtors are stated at the amount expected to be recovered.

Liability recognition

Liabilities are recognised where it is more likely than not that there is legal or constructive obligation committing the Society to pay out resources and the amount of the obligation can be measured with reasonable certainty.

Depreciation policy

Provision for depreciation of fixed assets held by the Society is made at rates calculated to spread the cost less residual value of each asset evenly over its expected useful life. The rates applied are as follows:

Computer Equipment	25%	Straight-line basis
Display Equipment	15%	Straight-line basis
Office Equipment	15%	Straight-line basis

GLOUCESTERSHIRE FAMILY HISTORY SOCIETY

NOTES TO THE ACCOUNTS (cont.)

YEAR ENDED 31 MARCH 2025

2. TANGIBLE FIXED ASSETS

	Computer Equipment	Display Equipment	Office Equipment	Total
COST				
At 1 April 2024	13,844.24	3,569.58	1,602.47	19,016.29
Additions	601.82	-	-	601.82
At 31 March 2025	14,446.06	3,569.58	1,602.47	19,618.11
DEPRECIATION				
At 1 April 2024	2,976.83	3,553.38	1,574.87	8,105.08
Charge for the year	2,963.62	16.20	16.56	2,996.38
At 31 March 2025	5,940.45	3,569.58	1,591.43	11,101.46
NET BOOK VALUE				
31 March 2025	£ 8,505.61	£ -	£ 11.04	£ 8,516.65
31 March 2024	£ 10,867.41	£ 16.20	£ 27.60	£ 10,911.21

3. DEBTORS AND PREPAYMENTS

	2025	2024
Gift Aid	193.13	1,896.25
Royalties	60.94	74.55
Interest	326.85	305.60
Prepayments	1,824.98	1,803.99
Other Debtors	45.00	45.00
	£ 2,450.90	£ 4,125.39

4. CREDITORS AND ACCRUALS

	2025	2024
Creditors	377.48	311.34
Accruals	414.77	461.05
	£ 792.25	£ 772.39