

THE FAMILY HISTORY SOCIETY OF CHESHIRE

England & Wales · Charity number 515168

Details

Other names CHESHIRE FHS, F H S OF CHESHIRE

Status Registered

Legal form Other

Registered 1984-05-29

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

Contact

Address The Rajar Building
Town Lane
Mobberley
Knutsford
Cheshire
WA16 7ER

Phone 01565 872210

Email secretary@fhsc.org.uk

Website www.fhsc.org.uk

Activities

Objects: TO ADVANCE THE EDUCATION OF THE PUBLIC IN THE STUDY OF FAMILY HISTORY IN ALL ITS MANY ASPECTS.

Activities: Advances the education of the public in the study of Family History in all its many aspects. There are groups who meet throughout Cheshire and elsewhere.

Classification

- **How:** Provides Advocacy/advice/information, Sponsors Or Undertakes Research
- **What:** Education/training
- **Who:** The General Public/mankind

Geography

- Cheshire East
- Cheshire West & Chester
- Halton
- Harrow
- Stockport
- Tameside
- Trafford
- Wirral

Finances

Period end	Income	Expenditure	Assets	Employees
2025-06-30	£29,875	£39,654	-	-
2024-06-30	£35,791	£43,850	-	-
2023-06-30	£31,742	£42,304	-	-
2022-06-30	£32,016	£35,025	-	-
2021-06-30	£29,993	£31,273	-	-

Trustees

Name	Role	Appointed
Margaret Lillian Roberts	Chair	2023-10-28
Alan Turley		2024-10-26
Angela Moore		2025-10-25
DAVID GUYTON		
Ian Alan Worthington		2024-10-26
Kevin Dean		2024-10-26
MARGARET SPATE		
MR GEOFF JOHNSON		
Robert William Brown		2024-10-26
Sheila Anne Jones		2022-11-05

THE FAMILY HISTORY SOCIETY OF CHESHIRE

England & Wales - Charity number 515168

Accounts

THE FAMILY HISTORY SOCIETY OF CHESHIRE
ACCOUNTS FOR THE
YEAR ENDED 30TH JUNE 2025

BRIGHT PARTNERSHIP LIMITED
CHARTERED ACCOUNTANTS



THE FAMILY HISTORY SOCIETY OF CHESHIRE
(Charity no. 515168)

Trustees' Annual Report to the Charity Commission for the Year 2024-2025

OBJECTS

The object of the charity is to advance the education of the public in the study of family history in all its many aspects.

GOVERNING DOCUMENT

The charity is an unincorporated association governed by its constitution, originally set up around 1969 and currently the "1999 Constitution as amended 20th October 2001, 30th October 2021 and 20th July 2024".

CONTROL

Following a major review of the Society's operations and management structures carried out during 2024, a new revised Constitution was approved at an Extraordinary General Meeting held on 20th July 2024 and implemented with effect from 1st September 2024, at which point it was also submitted to the Charity Commission. This revised Constitution included considerable changes to the Management of the Society, which is now vested in ten trustees elected at the AGM, namely:

(a) Five Officers

Chair

Honorary Secretary

Honorary Treasurer

Two other Officers (currently designated as a Communications Officer and a Membership Services Officer)

and

(b) Five Elected Trustees

All trustees are unpaid.

The five Officers have responsibility for the oversight of day-to-day operations of specific functions and meet as a Management Committee. The Management Committee reports to a Board of Trustees consisting of all ten trustees.

TRUSTEES

The Chair for the reporting period 2024-2025 was Margaret Lillian Roberts of 4 Dunns Cottages, Butterton Lane, Oakhanger, Cheshire CW1 5UU.

The charity's principal address is that of the Mobberley Research Centre, Rajar Building, Town Lane, Mobberley, WA16 7ER.

A list of the trustees in place for 2024-25 is attached. It contains names of those who held that position during the financial year.

A training session for all trustees was held in December 2024, delivered by the Company

Secretary of the Federation of Family History Societies and including a review of the responsibilities of the trustees under the Trustee Act 2000, Charities Act 2011 and Equality Act 2010.

PLANNING

The bulk of the Society's activities are planned in advance. However, some aspects of the society's activities are necessarily opportunistic rather than susceptible to considered planning. For example, library acquisitions depend on available funds and suitable works and collections coming up for sale or storage in an archive.

ADVISERS

The society is a member of the Federation of Family History Societies (FFHS). Membership brings with it advice on matters relevant to the conduct of the society's affairs, either from FFHS staff or from their legal advisers or insurers. The Society contracts out some accounting functions and this may include an element of advice. Advice is sometimes sought from members of the society who have suitable expertise.

RISK

There appear to be no major risks to which the Society is exposed that are not covered by the insurance arranged through the FFHS. Assets insurance is provided by Aviva Insurance. The trustees commissioned an independent Financial Controls and Governance Review during the 2024-25 financial year. This identified a number of risks relating to the operation of separate bank accounts by the Society's local groups and the trustees are taking steps to close these accounts, bringing the funds into the Society's main accounts by the end of the 2025-26 financial year.

DATA PROTECTION

The Society is committed to complying with all relevant data protection legislation.

INDEPENDENT EXAMINER

The constitution calls for an independent examiner or auditor to be appointed. The independent examiner for the period was the Bright Partnership, Suite 1, Armcon Business Park, London Road South, Poynton, Cheshire, SK12 1LQ

ACCOUNTS

The accounts are presented on an accruals basis. The central accounts have been consolidated with the accounts of the 10 local groups operating in the 2024-25 financial year to generate the annual financial report. The Society is not registered for VAT, but is registered for VATMOSS in the Republic of Ireland for digital sales in the EU. The Financial Controls and Governance Review recommended moving from an accruals basis to a receipts and payment basis and this is being put in place for the 2025-26 financial year. In 2022-23, the trustees noted that there had been no review of the methodology used for depreciation of the value of tangible fixed assets for some time and this was addressed during 2023-24 and 2024-25, resulting in a considerable down-valuation of assets with a substantial amount being written off in each year.

RESERVES

The total monetary assets (Net Current Assets) in the consolidated accounts are shown as: £149,847.

The former executive committee determined (report, December 1999) that the reserves within its central accounts should be targeted at between one third and two thirds of its annual subscription. These reserves consist of: working capital; funds for the purchase of research materials; equipment; renewal provision, and provision for unforeseen expenditure. For the

year ending 30th June 2025 the annual subscription income was £19,400. Reserves are currently in excess of target. The trustees are satisfied that the reserves policy is appropriate and the level of reserves this year is suitable for the prevailing circumstances. A review of the reserves policy was planned for 2023-2024 but was subsequently deferred in view of the broader review of the Society's management and pending changes to the financial operations of the Society which commenced in 2024-25 and will be completed by the end of the 2025-26 financial year.

PUBLIC BENEFIT REPORTING REQUIREMENT

The next section charts the activities of the Society during the reporting year. This has been prepared with regard to the guidance in the Charity Commission's brochure PB1 "Charities and Public Benefit" published in September 2013.

ACTIVITIES, ACHIEVEMENTS and PUBLIC BENEFIT 2024-25

During the reporting year 2024-25, the Society carried out a wide range of activities, including the operation of its family history research centres at Mobberley and Crewe and local group meetings. Additionally, the Cheshire Family History Seminar Series of on-line talks and presentations by nationally known figures, which commenced in the autumn of 2021 with monthly meetings, has continued to be well-attended and widely praised for its accessibility to members from outside Cheshire, including overseas members. There is a full programme for 2025-2026, enhanced by additional online Cheshire Research Seminar Buddies allowing interaction between members both in and outside Cheshire with similar interests in geographical areas of the county and by new online Discussion Groups. The Society's Board of Trustee meetings were held online facilitating attendance by the trustees, regardless of their location. Attendance at the 2025 Annual General Meeting also showed continuation of the trend for greater engagement by members now that its business, preceded by a talk given by a nationally known speaker, is held online.

Membership

A substantial percentage of the members now join via the internet and this facilitates our ability to address a geographically wide public. A gradual decline in membership over recent years is a matter of concern to the Society and the Society's outreach activities to the general public and is being addressed through the new management arrangements including the appointment of an additional officer to act as Membership Services Officer. Renewals in 2025 continued to reflect that decline although many members continue to express their appreciation of the new opportunities provided by online meetings which have developed since the pandemic. Given the circumstances, membership numbers have held up well, supported by significant improvements in recent years in the arrangements for new members. The Society is looking to increase its presence at heritage and family history events in 2025-26, both to further its objects under its Constitution but also to attract potential new members.

Mobberley Research Centre

The Mobberley Research Centre is at The Rajar Building, Town Lane, Mobberley, WA16 7ER. These premises provide light and bright accommodation and space for the Society's extensive collection of documents and computer resources.

The Rajar Building is owned by Mobberley Parish Council and was the subject of refurbishment with the aid of an S106 agreement following planning permission for new homes in the village. The Research Centre is staffed by volunteers and is overseen by a Management Committee. The Centre is the focus of our service provision, providing an invaluable resource for the Society in general and for members at the eastern side of the county in particular. It is open to non-members for a small donation. The multifunctional machines that handle media and copying continue to reinforce their value to the society and to make the wide range of

resources available for research. The Centre continues to respond to the increase in on-line genealogical information although *Find My Past*, *Ancestry* and *The Genealogist* websites, remain the preferred and cost-effective sites accessed by subscription, together with access to the many free to search sites. Attendance at the Research Centre has substantially decreased since the pandemic and, as a consequence and in view of the reduced availability of volunteers, the Research Centre has reduced its opening times from three days to two days a week.

Crewe Family History Unit

Previously based in the Crewe Municipal Building, the Unit relocated in 2025 to rooms provided by Cheshire East Council in its Brierley Business Centre. It holds a good cross section of research material including free access to the same websites as the Mobberley Research Centre, local parish registers, an extensive library and the Crewe Collection. The Unit is run by volunteers and opens two days a week and on occasional Saturdays. The Unit also has a space for talks and displays.

The Society continues to be heavily involved in collaboration with Cheshire Archives and Local Studies (CALs) in the development of plans for the new Crewe history centre and it is anticipated that the Family History Unit will in due course relocate into the new centre. Discussions with CALs are also ongoing with regard to the options open to the Society to be involved in the similar developments for the new Chester history centre. The trustees are aware that the costs of operating the Mobberley Research Centres account for a large part of the Society's annual expenditure and that this requires careful consideration in relation to any future developments which the Society may enter into with CALs.

Internet presence

The Society's website continues to provide an invaluable line of communication to members. There is a monthly newsletter, sent out to all members for whom it has an email address. This gives information, news and hints, advising members of upcoming events in the family history world and links to useful websites. The Society's presence on Facebook and BlueSky has been enhanced and consolidated proving a valuable resource for members and non-members alike. All these areas of online activity are constantly reviewed and updated to ensure that the best information and encouragement is given. A new Social Media Policy was approved by the trustees in 2025.

The Society's website itself is reviewed constantly to allow improvement and updates following feedback from users and, in particular, feedback gained from the membership survey conducted in December 2023. It is accessed by members and non-members alike. The Webmaster and his Web Assistant have ensured that members are fully cognisant of the opportunities the site offers. All group leaders can manage their own web presence in a time efficient way providing members with information about group activities and other local events and projects. Such activities, and the broader opportunities now available, enhance membership of the Society. Easily accessible information available on line for the general public raises the Society's profile and encourages new members to join and to pursue the study of family history. An active online Forum allows members and non-members to raise issues and problems they are facing in their research and to discuss possible solutions with other users. New members can thus benefit from the experience of others. The Members' only section of the site gives them access to documentation relevant to the society's activities. After an extensive, and ongoing, digitisation of its resources the Society's online shop offers a wide range of digitised resources for download and CDs for which it owns the copyright and other items of interest to family historians. The website also has links to other relevant family history sites where members and the general public can pursue their research. All of this benefits the society's members and researchers worldwide.

The Society also hosts and manages the website for the North West Group of Family History Societies.

Electronic projects

Electronic records of Cheshire related material are produced from the projects undertaken by our groups, volunteers, members and others. Microfiche and CD/DVD resources are being replaced as more of the Society's resources are digitised for download through the online shop and for placement on commercial family history sites.

Local Groups

The Society's local groups provide a focus for people in specific localities in Cheshire. A popular and important part of our work is undertaken by these groups, with group committee members providing local knowledge, organising talks (either face-to-face, online or a mixture of the two), undertaking the collection of data and making this available worldwide, and helping members and the public with their research at local help desks in libraries and other community facilities. In the 2024-2025, reporting year the Society had 10 Local Groups operating across the historic County of Cheshire. Sadly, a lack of volunteers to run its Tameside group led to the group's closure in August 2025 although a monthly helpdesk is still offered at the Tameside Local Studies and Archives Library, together with a weekly helpdesk at Wallasey Central Library. These helpdesks are open to both members and non-members.

The Computer Club

The Computer Club plays an important role in providing advice on all aspects of the digital world, holding regular meetings to address current issues and problems and to look at new initiatives and sources of information relevant to family historians.

The Computer Club pioneered the use of online meetings discovering that more people attended than did a physical meeting and that members from all over the country, and elsewhere in the world, were willing and able to interact with the Society. Online working has also enabled small groups with particular interests to be formed which can then feed back to the Club and the Society; these have recently been opened up more widely to members of the Society, together with a monthly online chat session.

Journal

The society's journal, the *Cheshire Ancestor*, remains a focus of communication with our members. It is produced quarterly and continues to be both entertaining and a mine of useful information. As a result of increased publishing and postage costs members have the opportunity of receiving an electronic version of the journal at a lower subscription rate but a significant number of members prefer to continue to receive the journal in paper format. The journal is distributed to the major libraries, archive offices and local studies libraries throughout the historic county of Cheshire covering the following modern local authority areas: Cheshire East, Cheshire West and Chester, Wirral, Halton, Stockport, Trafford and Tameside. It is hoped that this will raise the Society's profile and attract members from those who are using these resource centres at the beginning of their family history journey.

Transcription, indexing and publications

Reduction in membership numbers and the closure of a number of the local groups in recent years has affected the availability of members to participate in projects for the transcription and/or indexing of all sorts of written historical records and also of gravestones, war memorials and other relevant data. Where these projects have been feasible, this has benefited all those in this country and overseas who have Cheshire ancestry. The publication of these results online as downloads through the Society's online shop, in book form, or as CDs enables access for those who are unable to visit local Cheshire facilities through disability or distance. This is a public service that most or all family history societies, and other historical

organisations, undertake. It is anticipated that there will be greater scope to resume more of this project work once the new CALS history centres have opened.

Lectures

The Society is always ready to provide speakers to educate the public at formal education establishments or at meetings of other organisations, including those that do not have a historical focus. Our own meetings often include speakers on wider aspects of social, local, national and international history that put family history in context. These local group meetings are advertised locally and non-members are invited to attend. The Society is planning on holding a number of one-off Family History events during 2026 in association with other Cheshire-based organisations and is looking into the development of online family history classes.

Co-operation with others

The society is a member of the Federation of Family History Societies and of the North West Group of Family History Societies and liaises with other family history societies, local Registrars, local studies officers and the media. There is good co-operation with the Cheshire Archives and Local Studies (CALS) and the Society continues to be actively engaged in the ongoing consultation on the future of the archive service within Cheshire and the role that the Society can have in these future developments. A Memorandum of Understanding was agreed with both the Cheshire Local Authorities as part of the bid for Heritage Lottery Funding for the Archives Project. The Society also works with the Wirral Archives Services, is a member of the Cheshire Local History Association and the Lancashire Parish Registers Society.

Volunteer Activities


The Society can only function through the work of its volunteers. A survey undertaken in the 2017-2018 reporting year indicated over 20,000 hours contributed by volunteers, equivalent to around 12 full time staff and over £150,000 at the national minimum wage. The trustees would wish to acknowledge the debt that is owed to all those who give willingly of their time to further the objectives of the Society and for the benefit of the public.

ATTACHMENTS

List of trustees during the financial year ending 30th June 2025.

DECLARATION

Signed with the authority of the trustees,

A rectangular box containing a handwritten signature in dark ink. The signature appears to be 'M Roberts'.

Margaret Roberts
Chair

FHSC Trustee List

Those who occupied a position as Trustee of the Family History Society of Cheshire for the Reporting Year 1st July 2024 to 30th June 2025:

BROWN, Robert

DAVENPORT Peter,

DEAN, Kevin

GUYTON David,

JOHNSON Geoff,

JONES, Sheila

ROBERTS, Margaret,

SPATE Margaret,

TURLEY, Alan

WORTHINGTON, Ian

THE FAMILY HISTORY SOCIETY OF CHESHIRE

INDEPENDENT EXAMINER'S REPORT TO THE MANAGING COMMITTEE

We report on the accounts of The Family History Society of Cheshire for the year ended 30th June 2025.

Respective responsibilities of the Managing Committee and Examiner

As the association's Managing Committee, you are responsible for the preparation of the accounts; you consider that an audit is not required under section 144(2) of the Charities Act 2011 and that an independent examination is needed.

It is our responsibility to:

- * examine the accounts under section 145 of the 2011 Act;
- * follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- * state whether particular matters have come to my attention.

Basis of Independent Examiner's Report

Our 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 Association 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 you as trustees concerning 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 our examination, no matter has come to our attention:

- (1) which gives us reasonable cause to believe that in any material respect, the requirements:
 - * to keep accounting records (in accordance with section 130 of the 2011 Act); and
 - * to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Acthave not been met; or
- (2) to which, in our opinion, attention should have been drawn in order to enable a proper understanding of the accounts to be reached.



Bright Partnership Limited
Chartered Accountants

Suite 1, Armcon Business Park
London Road South
Poynton
Cheshire
SK12 1LQ

13th November 2025

THE FAMILY HISTORY SOCIETY OF CHESHIRE

ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2025

STATEMENT OF INCOME & EXPENDITURE

	2025	2024
	£	£
INCOME		
Subscriptions	19,400	22,538
Interest on deposits	3,882	3,719
Book sales	133	26
CD sales	65	89
Advertising	-	-
Research rooms - Mobberley	664	1,300
Royalties	466	678
Website income	809	1,620
Donations	30	795
Funds from closed groups	5,204	-
Total income for year	<u>30,653</u>	<u>30,765</u>
EXPENDITURE		
Magazine printing	3,311	4,200
Magazine postage	3,872	4,338
Capitation to groups	-	5,500
Grants to groups	-	-
Royalties to groups	-	-
Insurance & FFHS subscription	867	1,373
Subscriptions	433	262
Book purchases for resale	150	250
CD purchases for resale	225	335
Membership expenses	1,677	1,552
Research rooms - Mobberley	9,338	9,837
Crewe research centre	82	245
Website expenses	2,387	2,174
Committee costs	110	135
Accountancy charges	3,215	5,020
Other expenditure	694	639
Depreciation	4,591	4,563
Total expenditure for the year	<u>30,952</u>	<u>40,423</u>
Deficit	(299)	(9,658)
Exceptional item		
Historical asset write off	(30,000)	-
	<u>(30,299)</u>	<u>(9,658)</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2025

BALANCE SHEET

	2025 £	2025 £	2024 £	2024 £
Tangible Fixed Assets				
Equipment at net book value	205		230	
Additions during year	489		230	
	<u>694</u>		<u>230</u>	
Less: Depreciation for year	<u>(53)</u>		<u>(25)</u>	
		641		205
Furniture & other equipment at net book value		-		-
Microfiche library at net book value		-		-
Mobberley leasehold improvements at net book value		-		-
Library Books at net book value	40,850		45,388	
Less: Depreciation for year	(4,538)		(4,538)	
Historical asset value written off	<u>(30,000)</u>		<u>-</u>	
		<u>6,312</u>		<u>40,850</u>
		6,953		41,055
Current Assets				
Stock	200		575	
Sundry debtors	1,575		1,637	
Prepayments	3,124		3,178	
Cash at bank	111,686		107,473	
	<u>116,585</u>		<u>112,863</u>	
Current Liabilities				
Subscriptions received in advance	4,825		4,989	
Other creditors and accruals	<u>2,065</u>		<u>1,982</u>	
	6,890		6,971	
Net Current Assets		109,695		105,892
TOTAL ASSETS		<u>116,648</u>		<u>146,947</u>
Financed by:				
Society Funds				
Balance at 1st July 2024		146,947		156,605
(Deficit)/Surplus for year		<u>(30,299)</u>		<u>(9,658)</u>
		<u>116,648</u>		<u>146,947</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE**CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2025****STATEMENT OF INCOME & EXPENDITURE**

	2025	2024
	£	£
INCOME		
Subscriptions	19,400	22,538
Interest on deposits	3,998	3,822
Book sales	350	326
CD sales	65	89
Advertising	-	-
Research rooms - Mobberley	665	1,300
Royalties	466	678
Donations	465	1,236
Other income	580	547
Door money	3,077	3,635
Website income	809	1,620
Total income for year	<u>29,875</u>	<u>35,791</u>
EXPENDITURE		
Magazine printing	3,311	4,200
Magazine postage	3,872	4,338
Insurance & FFHS subscription	867	1,373
Subscriptions	433	262
Book purchases for resale	150	250
CD purchases for resale	225	335
Membership expenses	1,677	1,552
Research rooms - Mobberley	9,338	9,837
Crewe research centre	82	245
Website expenses	2,387	2,174
Committee costs	110	135
Room hire	2,165	2,895
Accountancy charges	3,215	5,020
Library expenses	277	23
Other expenditure	2,880	2,233
Speakers	2,159	2,909
Refreshments	665	711
Donations and gratuities	1,250	20
Depreciation	4,591	5,338
Total Expenditure for the year	<u>39,654</u>	<u>43,850</u>
(Deficit)/Surplus	(9,779)	(8,059)
Exceptional item		
Historical asset write off	(32,920)	(48,886)
	<u>(42,699)</u>	<u>(56,945)</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2025

BALANCE SHEET

	2025 £	2025 £	2024 £	2024 £
Tangible Fixed Assets				
Equipment at Net Book Value	1,200		28,757	
Additions during year	489		500	
	<u>1,689</u>		<u>29,257</u>	
Less: Depreciation for year	(53)		(530)	
Historical Asset Value written off	<u>(995)</u>		<u>(27,527)</u>	
		641		1,200
Furniture & Other Equipment at Net Book Value	435		4,298	
Less: Depreciation for year	-		(200)	
Historical Asset Value written off	<u>(435)</u>		<u>(3,663)</u>	
		-		435
Microfiche Library at Net Book Value		-		-
Mobberley Leasehold Improvements at Net Book Value		-		-
Library Books at Cost at Net Book Value	42,340		64,644	
Less: Depreciation for year	(4,538)		(4,608)	
Historical Asset Value written off	<u>(31,490)</u>		<u>(17,696)</u>	
		6,312		42,340
		<u>6,953</u>		<u>43,975</u>
Current Assets				
Stock	200		575	
Sundry Debtor	1,575		1,637	
Prepayments	3,124		3,178	
Cash at Bank	150,724		156,277	
Cash in Hand	1,114		828	
	<u>156,737</u>		<u>162,495</u>	
Current Liabilities				
Subscriptions Received in Advance	4,825		4,989	
Accruals	2,065		1,982	
	<u>6,890</u>		<u>6,971</u>	
Net Current Assets		149,847		155,524
TOTAL ASSETS		<u>156,800</u>		<u>199,499</u>
Financed by:				
Group Funds				
Balance at 1st July 2024	199,499		256,444	
(Deficit)/Surplus for year	<u>(42,699)</u>		<u>(56,945)</u>	
		156,800		199,499
		<u>156,800</u>		<u>199,499</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

England & Wales - Charity number 515168

Accounts

THE FAMILY HISTORY SOCIETY OF CHESHIRE
(Charity no. 515168)

Trustees' Annual Report to the Charity Commission for the Year 2023-2024

OBJECTS

The object of the charity is to advance the education of the public in the study of family history in all its many aspects.

GOVERNING DOCUMENT

The charity is an unincorporated association governed by its constitution, originally set up around 1969 and currently the "1999 Constitution as amended 20th October 2001 and 30th October 2021".

CONTROL

The Management of the Society up to the 2024 AGM was vested by the Constitution (as approved in 2021) in the trustees who were members of the executive committee, which met three times a year, and consisted of:

(a) Officers elected at the AGM:

Chairman
Secretary
Treasurer

and

Some Officials appointed to specific posts within the society

(b) Co-opted members and those who fill any casual vacancy

(c) One delegate representative from each of the 12 Local Groups and the Computer Club.

All trustees were unpaid.

Many committee members had individual responsibility for the day-to-day operations of specific functions. Reporting was via their membership of the Society's executive committee, supplemented in some cases by written reports. Sub-committees were sometimes set up to deal with particular issues.

Following a major review of the Society's operations and management structures carried out during 2024, a new revised Constitution was approved at an Extraordinary General Meeting held on 20th July 2024 and implemented with effect from 1st September 2024, at which point it was also submitted to the Charity Commission. This revised Constitution included considerable changes to the Management of the Society, which is now vested in ten trustees elected at the AGM, namely:

(a) Five Officers

Chair
Honorary Secretary
Honorary Treasurer
Two other Officers (currently designated as a Communications Officer and a Membership Services Officer)

and

(b) Five Elected Trustees

All trustees are unpaid.

The five Officers have responsibility for the oversight of day-to-day operations of specific

functions and meet as a Management Committee. The Management Committee reports to a Board of Trustees consisting of all ten trustees.

TRUSTEES

The Chairman for the reporting period 2023-2024 was Margaret Lillian Roberts of 4 Dunns Cottages, Butterton Lane, Oakhanger, Cheshire CW1 5UU.

The charity's principal address is that of the Mobberley Research Centre, Rajar Building, Town Lane, Mobberley, WA16 7ER.

A list of the trustees in place for 2023-24 is attached. It contains names of those who held that position during the financial year.

PLANNING

The bulk of the Society's activities are planned in advance. However, some aspects of the society's activities are necessarily opportunistic rather than susceptible to considered planning. For example, library acquisitions depend on available funds and suitable works and collections coming up for sale or storage in an archive.

ADVISERS

The society is a member of the Federation of Family History Societies (FFHS). Membership brings with it advice on matters relevant to the conduct of the society's affairs, either from FFHS staff or from their legal advisers or insurers. The Society contracts out some accounting functions and this may include an element of advice. Advice is sometimes sought from members of the society who have suitable expertise.

RISK

There appear to be no major risks to which the Society is exposed that are not covered by the insurance arranged through the FFHS. Assets insurance is provided by Aviva Insurance.

DATA PROTECTION

The Society is committed to complying with all relevant data protection legislation.

INDEPENDENT EXAMINER

The constitution calls for an independent examiner or auditor to be appointed. The independent examiner for the period was Messrs. Heywood Shepherd, Chartered Accountants, 1 Park St, Macclesfield, Cheshire SK11 6SR.

ACCOUNTS

The accounts are presented on an accruals basis. The central accounts have been consolidated with the accounts of the computer club and the 12 local groups to generate the annual financial report. The Society is not registered for VAT, but is registered for VATMOSS in the Republic of Ireland for digital sales in the EU. In 2022-23, the trustees noted that there had been no review of the methodology used for depreciation of the value of tangible fixed assets for some time and this was addressed during 2023-24, resulting in a considerable down-valuation of assets with a substantial amount being written off.

RESERVES

The total monetary assets (Net Current Assets) in the consolidated accounts are shown as:
£146,947

The former executive committee determined (report, December 1999) that the reserves within its central accounts should be targeted at between one third and two thirds of its annual subscription. These reserves consist of: working capital; funds for the purchase of research materials; equipment; renewal provision; and provision for unforeseen expenditure. For the year ending 30th June 2024 the annual subscription income was £22,538. Reserves are

currently in excess of target. The trustees are satisfied that the reserves policy is appropriate and the level of reserves this year is suitable for the prevailing circumstances. A review of the reserves policy was planned for 2023-2024 but subsequently deferred to 2024-2025 in view of the broader review of the Society's management.

PUBLIC BENEFIT REPORTING REQUIREMENT

The next section charts the activities of the Society during the reporting year. This has been prepared with regard to the guidance in the Charity Commission's brochure PB1 "Charities and Public Benefit" published in September 2013.

ACTIVITIES, ACHIEVEMENTS and PUBLIC BENEFIT 2023-24

During the reporting year 2023-24, the Society carried out a wide range of activities, including the operation of its family history research centres at Mobberley and Crewe and local group meetings. Additionally, the Cheshire Family History Seminar Series of on-line talks and presentations by nationally known figures, which commenced in the autumn of 2021 with monthly meetings, has continued to be well-attended and widely praised for its accessibility to members from outside Cheshire, including overseas members. There is a full programme for 2024-2025, enhanced by additional online Cheshire Research Seminar Buddies allowing interaction between members both in and outside Cheshire with similar interests in geographical areas of the county. The Society's Executive Committee meetings continued to be held online during 2023-2024, an advantage since its membership is drawn from all parts of the historic County of Cheshire. Attendance at the 2024 Annual General Meeting also showed continuation of the trend for greater engagement by members now that its business, preceded by a talk given by a nationally known speaker, is held on line.

Membership

A substantial percentage of the members now join via the internet and this facilitates our ability to address a geographically wide public. A gradual decline in membership over recent years is a matter of concern to the Society and the Society's outreach activities to the general public will be addressed through the new management arrangements including the appointment of an additional officer to act as Membership Services Officer. Renewals in 2024 continued to reflect that decline although many members continue to express their appreciation of the new opportunities provided by online meetings which have developed since the pandemic. . Given the circumstances membership numbers have held up well, supported by significant improvements in recent years in the arrangements for new members. A membership survey, conducted in December 2023 as part of the major review of the Society's operations was particularly well-supported and is has provided useful information with regard to the current make-up of the membership and the hopes and aspirations of the members with regard to the Society's offerings.

Mobberley Research Centre

The Mobberley Research Centre is at The Rajar Building, Town Lane, Mobberley, WA16 7ER. These premises provide light and bright accommodation, good access and space for the Society's extensive collection of documents and computer resources.

The Rajar Building is owned by Mobberley Parish Council and was the subject of refurbishment with the aid of an S106 agreement following planning permission for new homes in the village. The Research Centre is staffed by volunteers and is overseen by a Management Committee. The Centre is the focus of our service provision, providing an invaluable resource for the Society in general and for members at the eastern side of the county in particular. It is open to non-members for a small donation. The multifunctional machines that handle media and copying continue to reinforce their value to the society and to make the wide range of resources available for research. The turnover of volunteers, who provide advice and support

for visitors, to staff the centre remains low but, when people move on and the Centre's opening days have had to be curtailed accordingly. The Centre continues to respond to the increase in on-line genealogical information although *Find My Past*, *Ancestry* and *The Genealogist* websites, remain the preferred and cost-effective sites accessed by subscription, together with access to the many free to search sites.

Crewe Family History Unit

This is based in the Crewe Municipal Building, in rooms provided by Cheshire East Council. It holds a good cross section of research material including free access to the same websites as the Mobberley Research Centre, local parish registers, an extensive library and the Crewe and District and South East Cheshire local history archives. The Unit is run by volunteers and opens two days a week and on occasional Saturdays. The Unit also has a space for talks and displays.

The Society has been heavily involved in collaboration with Cheshire Archives and Local Studies (CALs) in the development of plans for the new Crewe history centre and it is anticipated that the Family History Unit will in due course relocate into the new centre. Discussions with CALs are also ongoing with regard to the options open to the Society to be involved in the similar developments for the new Chester history centre. The trustees are aware that the costs of operating the Mobberley Research Centres account for a large part of the Society's annual expenditure and that this requires careful consideration in relation to any future developments which the Society may enter into with CALs.

Internet presence

The Society's internet played a vital part in its response to the challenges of the pandemic and it has continued to provide an invaluable line of communication to members. There is a monthly newsletter, sent out to all members for whom it has an email address. This gives information, news and hints, advising members of upcoming events in the family history world and links to useful websites. The Society's presence on Facebook and X has been enhanced and consolidated proving a valuable resource for members and non-members alike. All these areas of online activity are constantly reviewed and updated to ensure that the best information and encouragement is given. Towards the end of 2024, the Society also opened a BlueSky account and is moving to reduce its presence on the X platform.

The Society's website itself is reviewed constantly to allow improvement and updates following feedback from users and, in particular, feedback gained from the membership survey conducted in December 2023. It is accessed by members and non-members alike. The Webmaster and his Web Assistant have ensured that members are fully cognisant of the opportunities the site offers. All group leaders can manage their own web presence in a time efficient way providing members with information about group activities and other local events and projects. Such activities, and the broader opportunities now available, enhance membership of the Society. Easily accessible information available on line for the general public raises the Society's profile and encourages new members to join and to pursue the study of family history. An active online Forum allows members and non-members to raise issues and problems they are facing in their research and to discuss possible solutions with other users. New members can thus benefit from the experience of others. The Members' only section of the site gives them access to documentation relevant to the society's activities. After an extensive, and ongoing, digitisation of its resources the Society's online shop offers a wide range of digitised resources for download and CDs for which it owns the copyright and other items of interest to family historians. The website also has links to other relevant family history sites where members and the general public can pursue their research. All of this benefits the society's members and researchers worldwide.

The Society also hosts and manages the website for the North West Group of Family History

Societies.

Electronic projects

Electronic records of Cheshire related material are produced from the projects undertaken by our groups, volunteers, members and others. Microfiche and CD/DVD resources are being replaced as more of the Society's resources are digitised for download through the online shop and for placement on commercial family history sites.

Local Groups

The Society's local groups provide a focus for people in specific localities in Cheshire. A popular and important part of our work is undertaken by these groups, with group committee members providing local knowledge, organising talks (either face-to-face, online or a mixture of the two), undertaking the collection of data and making this available worldwide, and helping members and the public with their research at local help desks in libraries and other community facilities. In the 2023-2024, reporting year the Society had 12 Local Groups operating across the historic County of Cheshire. Sadly, a lack of volunteers to run its Wallasey group led to the group's closure in August 2024 and, at the same time, the decision was taken for similar reasons to merge the Crewe group and the Nantwich group.

The Computer Club

The Computer Club plays an important role in providing advice on all aspects of the digital world, holding regular meetings to address current issues and problems and to look at new initiatives and sources of information relevant to family historians.

The Computer Club pioneered the use of online meetings discovering that more people attended than did a physical meeting and that members from all over the country, and elsewhere in the world, were willing and able to interact with the Society. Online working has also enabled small groups with particular interests to be formed which can then feed back to the Club and the Society.

Magazine

The society's magazine, the *Cheshire Ancestor*, remains a focus of communication with our members. It is produced quarterly and continues to be both entertaining and a mine of useful information. It has won the Federation of Family History Societies' "*Elizabeth Simpson Award*" several times for the best magazine. As a result of increased publishing and postage costs members have the opportunity of receiving an electronic version of the magazine at a lower subscription rate but a significant number of members prefer to continue to receive the magazine in paper format. The journal is distributed to the major libraries, archive offices and local studies libraries throughout the historic county of Cheshire covering the following modern local authority areas: Cheshire East, Cheshire West and Chester, Wirral, Halton, Stockport, Trafford and Tameside. It is hoped that this will raise the Society's profile and attract members from those who are using these resource centres at the beginning of their family history journey.

Transcription, indexing and publications

Considerable time and effort continues to be put in by members to projects for the transcription and/or indexing of all sorts of written historical records and also of gravestones, war memorials and other relevant data. This benefits all those in this country and overseas who have Cheshire ancestry. The publication of these results online as downloads through the Society's online shop, in book form, or as CDs enables access for those who are unable to visit local Cheshire facilities through disability or distance. This is a public service that most or all family history societies, and other historical organisations, undertake.

Lectures

The Society is always ready to provide speakers to educate the public at formal education establishments or at meetings of other organisations, including those that do not have a historical focus. Our own meetings often include speakers on wider aspects of social, local, national and international history that put family history in context. These local group meetings are advertised locally and non-members are invited to attend. Beginner's days are run in various parts of the county and Family History Awareness and Heritage Days are run in local libraries and churches by group members of our society. Family history classes are also run at our research centre. The 2023-24 review of the Society's operations has identified the possibility of enhancing the Society's delivery of its objects through online classes in the future.

Help Desk Advice

Some of our groups provide a help desk service in their local library and other community facilities for members of the public who are interested in tracing their family tree or need on-going advice. This service is for members and non-members alike, and is resuming after the pandemic restrictions.

Co-operation with others

The society is a member of the Federation of Family History Societies and of the North West Group of Family History Societies and liaises with other family history societies, local Registrars, local studies officers and the media. There is good co-operation with the Cheshire Archives and Local Studies (CALS) and the Society continues to be actively engaged in the ongoing consultation on the future of the archive service within Cheshire and the role that the Society can have in these future developments. A Memorandum of Understanding was agreed with both the Cheshire Local Authorities as part of the bid for Heritage Lottery Funding for the Archives Project. The Society also works with the Wirral Archives Services, is a member of the Cheshire Local History Association and the Lancashire Parish Registers Society.

Volunteer Activities

The Society can only function through the work of its volunteers. A survey undertaken in the 2017-2018 reporting year indicated over 20,000 hours contributed by volunteers, equivalent to around 12 full time staff and over £150,000 at the national minimum wage. The trustees would wish to acknowledge the debt that is owed to all those who give willingly of their time to further the objectives of the Society and for the benefit of the public.

ATTACHMENTS

List of trustees during the financial year ending 30th June 2024.

DECLARATION

Signed with the authority of the trustees,

Margaret Roberts
Chair

FHSC Trustee List

Those who occupied a position as Trustee of the Family History Society of Cheshire for the Reporting Year 1st July 2023 to 30th June 2024:

BARLOW, John
BENNETT Robert Alan,
DAVENPORT Peter,
GUYTON David,
HAMILTON Sheila,
JOHNSON Geoff,
JONES, Sheila
MITCHELL, Sheila,
MOORE Angela,
OLIVER Gay,
ROBERTS, Margaret,
RUGMAN Rev Hazel,
SPATE Margaret,
SMETHAM David,
SMETHAM Lesley
THOMAS David,
WRIGHT Robert.

THE FAMILY HISTORY SOCIETY OF CHESHIRE
ACCOUNTS FOR THE
YEAR ENDED 30TH JUNE 2024

BRIGHT PARTNERSHIP LIMITED
CHARTERED ACCOUNTANTS

THE FAMILY HISTORY SOCIETY OF CHESHIRE

ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2024

STATEMENT OF INCOME & EXPENDITURE

	2024	2023
	£	£
INCOME		
Subscriptions (This year only)	22,538	22,469
Interest on Deposits	3,719	1,340
Book Sales	26	40
CD Sales	89	136
Advertising	-	14
Research Rooms - Mobberley	1,300	1,110
Royalties	678	791
Website Income	1,620	1,178
Donations	795	110
Funds from Closed Groups	-	3,229
Total Income for year	<u>30,765</u>	<u>30,417</u>
EXPENDITURE		
Magazine Printing	4,200	5,973
Magazine Postage	4,338	5,030
Capitation to Groups	5,500	6,000
Grants to Groups	-	572
Royalties to Groups	-	45
Insurance & FFHS Subscription	1,373	1,588
Subscriptions	262	240
Book Purchases for Resale	250	500
CD Purchases for Resale	335	675
Membership Expenses	1,552	1,262
Research Rooms - Mobberley	9,837	10,865
Crewe Research Centre	245	163
Website Expenses	2,174	2,508
Committee Costs	135	-
Accountancy Charges	5,020	3,690
Other Expenditure	639	665
Depreciation	4,563	60
Total Expenditure for the year	<u>40,423</u>	<u>39,836</u>
(Deficit)/Surplus for the year	<u>(9,658)</u>	<u>(9,419)</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2024

BALANCE SHEET

	2024 £	2024 £	2023 £	2023 £
Tangible Fixed Assets				
Equipment at Net Book Value	230		230	
Additions during year	-		-	
	<u>230</u>		<u>290</u>	
Less: Depreciation for year	<u>25</u>		<u>60</u>	
		205		230
Furniture & Other Equipment at Net Book Value		-		-
Microfiche Library at Net Book Value		-		-
Mobberley Leasehold Improvements at Net Book Value		-		-
Library Books at Cost	45,388		45,388	
Less: Depreciation for year	<u>4,538</u>		<u>-</u>	45,388
		<u>40,850</u>		<u>45,618</u>
		41,055		
Current Assets				
Stock	575		1,150	
Sundry Debtors	1,637		2,047	
Prepayments	3,178		3,639	
Cash at Bank	<u>107,473</u>		<u>111,880</u>	
	<u>112,863</u>		<u>118,716</u>	
Current Liabilities				
Subscriptions Received in Advance	4,989		6,481	
Accruals	<u>1,982</u>		<u>1,248</u>	
	<u>6,971</u>		<u>7,729</u>	
Net Current Assets		105,892		110,987
TOTAL ASSETS		<u>146,947</u>		<u>156,605</u>
Financed by:				
Society Funds				
Balance at 1st July 2023		156,605		166,024
(Deficit)/Surplus for year		<u>(9,658)</u>		<u>(9,419)</u>
		<u>146,947</u>		<u>156,605</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2024

STATEMENT OF INCOME & EXPENDITURE

	2024	2023
	£	£
INCOME		
Subscriptions (This year only)	22,538	22,469
Interest on Deposits	3,822	1,372
Book Sales	326	321
CD Sales	89	136
Advertising	-	14
Research Rooms - Mobberley	1,300	1,110
Royalties	678	791
Donations	1,236	1,021
Other Income	547	763
Door Money	3,635	2,567
Website Income	1,620	1,178
Total Income for year	<u>35,791</u>	<u>31,742</u>
EXPENDITURE		
Magazine Printing	4,200	5,973
Magazine Postage	4,338	5,030
Insurance & FFHS Subscription	1,373	1,588
Subscriptions	262	240
Book Purchases for Resale	250	500
CD Purchases for Resale	335	675
Membership Expenses	1,552	1,262
Research Rooms - Mobberley	9,837	10,865
Crewe Research Centre	245	163
Website Expenses	2,174	2,508
Committee Costs	135	-
Room Hire	2,895	3,034
Accountancy Charges	5,020	3,690
Library Expenses	23	37
Other Expenditure	2,233	2,557
Speakers	2,909	2,846
Refreshments	711	418
Donations and Gratuities	20	100
Depreciation	5,338	818
Total Expenditure for the year	<u>43,850</u>	<u>42,304</u>
(Deficit)/Surplus	<u>(8,059)</u>	<u>(10,562)</u>
Exceptional Item		
Historical Asset write off	<u>(48,886)</u>	<u>-</u>
(Deficit) for year	<u>(56,945)</u>	<u>(10,562)</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2024

BALANCE SHEET

	2024 £	2024 £	2023 £	2023 £
Tangible Fixed Assets				
Equipment at Net Book Value	28,757		27,987	
Additions during year	500		1,313	
	<u>29,257</u>		<u>29,300</u>	
Less: Depreciation for year	530		543	
Historical Asset Value written off	<u>27,527</u>		-	
		1,200		28,757
Furniture & Other Equipment at Net Book Value	4,298		4,488	
Less: Depreciation for year	200		190	
Historical Asset Value written off	<u>3,663</u>		-	
		435		4,298
Microfiche Library at Net Book Value		-		-
Mobberley Leasehold Improvements at Net Book Value		-		-
Library Books at Cost at Net Book Value	64,644		64,729	
Less: Depreciation for year	4,608		85	
Historical Asset Value written off	<u>17,696</u>		-	
		42,340		64,644
		<u>43,975</u>		<u>97,699</u>
Current Assets				
Stock	575		1,150	
Sundry Debtor	1,637		2,047	
Prepayments	3,178		3,639	
Cash at Bank	156,277		158,732	
Cash in Hand	828		906	
	<u>162,495</u>		<u>166,474</u>	
Current Liabilities				
Subscriptions Received in Advance	4,989		6,481	
Accruals	1,982		1,248	
	<u>6,971</u>		<u>7,729</u>	
Net Current Assets		155,524		158,745
TOTAL ASSETS		<u>199,499</u>		<u>256,444</u>
Financed by:				
Group Funds				
Balance at 1st July 2023	256,444		267,006	
(Deficit)/Surplus for year	<u>(56,945)</u>		<u>(10,562)</u>	
		199,499		256,444
		<u>199,499</u>		<u>256,444</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

INDEPENDENT EXAMINER'S REPORT TO THE MANAGING COMMITTEE

We report on the accounts of The Family History Society of Cheshire for the year ended 30th June 2024

Respective responsibilities of the Managing Committee and Examiner

As the association's Managing Committee, you are responsible for the preparation of the accounts; you consider that an audit is not required under section 144(2) of the Charities Act 2011 and that an independent examination is needed.

It is our responsibility to:

- * examine the accounts under section 145 of the 2011 Act;
- * follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- * state whether particular matters have come to my attention.

Basis of Independent Examiner's Report

Our 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 Association 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 you as trustees concerning 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 our examination, no matter has come to our attention:

- (1) which gives us reasonable cause to believe that in any material respect, the requirements:
 - * to keep accounting records (in accordance with section 130 of the 2011 Act); and
 - * to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Acthave not been met; or
- (2) to which, in our opinion, attention should have been drawn in order to enable a proper understanding of the accounts to be reached.

Bright Partnership Limited

**Bright Partnership Limited
Chartered Accountants**

**1 Park Street
Macclesfield
Cheshire
SK11 6SR**

16th October 2024

THE FAMILY HISTORY SOCIETY OF CHESHIRE

INDEPENDENT EXAMINER'S REPORT TO THE MANAGING COMMITTEE

We report on the accounts of The Family History Society of Cheshire for the year ended 30th June 2024

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- (2) to which, in our opinion, attention should have been drawn in order to enable a proper understanding of the accounts to be reached.

Bright Partnership Limited

Bright Partnership Limited
Chartered Accountants

1 Park Street
Macclesfield
Cheshire
SK11 6SR

16th October 2024

THE FAMILY HISTORY SOCIETY OF CHESHIRE

England & Wales - Charity number 515168

Accounts

THE FAMILY HISTORY SOCIETY OF CHESHIRE
(Charity no. 515168)

Trustees' Annual Report to the Charity Commission for the Year 2022-2023

OBJECTS

The object of the charity is to advance the education of the public in the study of family history in all its many aspects.

GOVERNING DOCUMENT

The charity is an unincorporated association governed by its constitution, originally set up around 1969 and currently the "1999 Constitution as amended 20th October 2001 and 30th October 2021".

CONTROL

Management of the Society is vested by the constitution in the trustees who are members of the executive committee, which meets three times a year, and consists of:

(a) Officers elected at the AGM:

Chairman
Secretary
Treasurer

and

Some Officials appointed to specific posts within the society

(b) Co-opted members and those who fill any casual vacancy

(c) One delegate representative from each of the 12 Local Groups and the Computer Club.

All trustees are unpaid.

Many committee members have individual responsibility for the day-to-day operations of specific functions. Reporting is via their membership of the Society's executive committee, supplemented in some cases by written reports. Sub-committees are sometimes set up to deal with particular issues.

In the Spring of 2021, following advice from the Federation of Family History Societies, the Trustees and the Executive Committee reviewed the governance model to ensure that it reflected changes in the format of meetings and administrative procedures during the pandemic. They were also mindful that some of these changes had proved beneficial and that the Society's Constitution and governance model should be amended to enable the Society to benefit from the wider opportunities presented by the digital age. The amendments to the Society's administrative and meeting procedures and protocols included the ability to hold Annual General Meetings and other meetings on-line as well as in person, to vary the timings of meetings in exceptional circumstances, and to allow flexibility in the time periods for tenure of offices. These were presented to the Annual General Meeting on 30th October 2021 and were approved by those attending.

TRUSTEES

The Chairman for the reporting period 2022-2023 was Robert Alan Bennett of 8 Barford Drive, Lowton, Warrington WA3 1DD.

The charity's principal address is that of the Mobberley Research Centre, Rajar Building, Town Lane, Mobberley, WA16 7ER.

A list of the trustees is attached. It contains names of those who held that position during the financial year and who have continued up to the date of this document.

PLANNING

The bulk of the Society's activities are planned in advance. However, some aspects of the society's activities are necessarily opportunistic rather than susceptible to considered planning. For example, library acquisitions depend on available funds and suitable works and collections coming up for sale or storage in an archive.

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The society is a member of the Federation of Family History Societies (FFHS). Membership brings with it advice on matters relevant to the conduct of the society's affairs, either from FFHS staff or from their legal advisers or insurers. The Society contracts out some accounting functions and this may include an element of advice. Advice is sometimes sought from members of the society who have suitable expertise.

RISK

There appear to be no major risks to which the Society is exposed that are not covered by the insurance arranged through the FFHS. Assets insurance is provided by Aviva Insurance.

DATA PROTECTION

The Society is committed to complying with all relevant data protection legislation.

INDEPENDENT EXAMINER

The constitution calls for an independent examiner or auditor to be appointed. The independent examiner for the period was Messrs. Heywood Shepherd, Chartered Accountants, 1 Park St, Macclesfield, Cheshire SK11 6SR.

ACCOUNTS

The accounts are presented on an accruals basis. The central accounts have been consolidated with the accounts of the computer club and the 12 local groups to generate the annual financial report. The Society is not registered for VAT, but is registered for VATMOSS in the Republic of Ireland for digital sales in the EU. The Trustees have noted that there has been no review of the methodology used for depreciation of the value of tangible fixed assets for some time and this will be addressed during 2023-24.

RESERVES

The total monetary assets (Net Current Assets) in the consolidated accounts are shown as:

£158,745

The committee has determined (report, December 1999) that the reserves within its central accounts should be targeted at between one third and two thirds of its annual subscription. These reserves consist of: working capital; funds for the purchase of research materials; equipment; renewal provision; and provision for unforeseen expenditure. For the year ending 30th June 2023 the annual subscription income was £22,469. Reserves are currently in excess of target. The trustees are satisfied that the reserves policy is appropriate and the level of reserves this year is suitable for the prevailing circumstances. A review of the reserves policy is however planned for 2023-2024.

PUBLIC BENEFIT REPORTING REQUIREMENT

The next section charts the activities of the Society during the reporting year. This has been prepared with regard to the guidance in the Charity Commission's brochure PB1 "Charities and Public Benefit" published in September 2013.

ACTIVITIES, ACHIEVEMENTS and PUBLIC BENEFIT 2022-23

During the reporting year 2022-23, the Society has fully resumed all activities which had been paused during the pandemic, including the operation of its family history research centres at

Mobberley and Crewe and local group meetings. Additionally, the Cheshire Family History Seminar Series of on-line talks and presentations by nationally known figures, which commenced in the autumn of 2021 with monthly meetings, has continued to be well-attended and widely praised for its accessibility to members from outside Cheshire, including overseas members. There is a full programme for 2023-2024, enhanced by additional online Cheshire Research Seminar Buddies allowing interaction between members both in and outside Cheshire with similar interests in geographical areas of the county. The Society's Executive Committee meetings have also continued to be held online, an advantage since its membership is drawn from all parts of the historic County of Cheshire. Attendance at the 2023 Annual General Meeting also showed continuation of the trend for greater engagement by members now that its business, preceded by a talk given by a nationally known speaker was held on line.

Membership

A substantial percentage of the members now join via the internet and this facilitates our ability to address a geographically wide public. The Society has updated its membership forms to meet the changes required by the new GDPR regulations. A gradual decline in membership over recent years is a matter of concern to the Society. Renewals in 2023 continued to reflect that decline although many members continue to express their appreciation of the Society's response to the pandemic and to the new opportunities provided by online meetings. New members have joined as interest in family history expanded during the last two years. The challenge is to retain them. Given the circumstances membership numbers have held up well, supported by significant improvements in the arrangements for new members. A major review of the Society's activities and offerings has been initiated during 2023 and it is anticipated that this will lead to enhancements to be made during 2024 which it is hoped will encourage both retention of current members and recruitment of new members.

Mobberley Research Centre

The Mobberley Research Centre is at The Rajar Building, Town Lane, Mobberley, WA16 7ER. These premises provide light and bright accommodation, good access and space for the Society's extensive collection of documents and computer resources.

The Rajar Building is owned by Mobberley Parish Council and was the subject of refurbishment with the aid of an S106 agreement following planning permission for new homes in the village. A new lease agreement between the Parish Council and the Society was signed in 2023.

The Research Centre is staffed by volunteers and is overseen by a Management Committee.

The Centre is the focus of our service provision, providing an invaluable resource for the Society in general and for members at the eastern side of the county in particular. It is open to non-members for a small donation. The multifunctional machines that handle media and copying continue to reinforce their value to the society and to make the wide range of resources available for research. The turnover of volunteers, who provide advice and support for visitors, to staff the centre remains low but, when people move on, it is usually possible to find suitable new volunteers. The Centre continues to respond to the increase in on-line genealogical information although *Find My Past*, *Ancestry* and *The Genealogist* websites, remain the preferred and cost-effective sites accessed by subscription, together with access to the many free to search sites.

Crewe Family History Unit

This is based in the Crewe Municipal Building, in rooms provided by Cheshire East Council. It holds a good cross section of research material including free access to the same websites as the Mobberley Research Centre, local parish registers, an extensive library and the Crewe

and District and South East Cheshire local history archives. The Unit is run by volunteers and opens two days a week and on occasional Saturdays. The Unit also has a space for talks and displays.

The Society has been heavily involved in collaboration with Cheshire Archives and Local Studies (CALs) in the development of plans for the new Crewe history centre and it is anticipated that the Family History Unit will in due course relocate into the new centre. Discussions with CALs are also ongoing with regard to the options open to the Society to be involved in the similar developments for the new Chester history centre.

Internet presence

The Society's internet played a vital part in its response to the challenges of the pandemic and it has continued to provide an invaluable line of communication to members. There is a monthly newsletter, sent out to all members for whom it has an email address. This gives information, news and hints, advising members of upcoming events in the family history world and links to useful websites. The Society's presence on Facebook and Twitter has been enhanced and consolidated proving a valuable resource for members and non-members alike. All these areas of online activity are constantly reviewed and updated to ensure that the best information and encouragement is given.

The Society's website itself is reviewed constantly to allow improvement and updates following feedback from users. It is accessed by members and non-members alike. The Webmaster and his Web Assistant have ensured that members are fully cognisant of the opportunities the site offers. All group leaders can manage their own web presence in a time efficient way providing members with information about group activities and other local events and projects. Such activities, and the broader opportunities now available, enhance membership of the Society. Easily accessible information available on line for the general public raises the Society's profile and encourages new members to join and to pursue the study of family history. An active online Forum allows members and non-members to raise issues and problems they are facing in their research and to discuss possible solutions with other users. New members can thus benefit from the experience of others. The Members' only section of the site gives them access to documentation relevant to the society's activities. After an extensive, and ongoing, digitisation of its resources the Society's online shop offers a wide range of digitised resources for download and CDs for which it owns the copyright and other items of interest to family historians. The website also has links to other relevant family history sites where members and the general public can pursue their research. All of this benefits the society's members and researchers worldwide.

The Society also hosts and manages the website for the North West Group of Family History Societies.

Electronic projects

Electronic records of Cheshire related material are produced from the projects undertaken by our groups, volunteers, members and others. Microfiche and CD/DVD resources are being replaced as more of the Society's resources are digitised for download through the online shop and for placement on commercial family history sites.

Local Groups

The Society's local groups provide a focus for people in specific localities in Cheshire. A popular and important part of our work is undertaken by these groups, with group committee members providing local knowledge, organising talks (either face-to-face, online or a mixture of the two), undertaking the collection of data and making this available worldwide, and helping members and the public with their research at local help desks in libraries and other community facilities. In the 2022-2023 reporting year the Society had 12 Local Groups

operating across the historic County of Cheshire. Sadly, a lack of volunteers to run its Bramhall group led to the group's closure in November 2022, but members of the group were offered the opportunity to transfer to other local groups.

The Computer Club

The Computer Club plays an important role in providing advice on all aspects of the digital world, holding regular meetings to address current issues and problems and to look at new initiatives and sources of information relevant to family historians.

The Computer Club pioneered the use of online meetings discovering that more people attended than did a physical meeting and that members from all over the country, and elsewhere in the world, were willing and able to interact with the Society. Online working has also enabled small groups with particular interests to be formed which can then feed back to the Club and the Society.

Magazine

The society's magazine, the *Cheshire Ancestor*, remains a focus of communication with our members. It is produced quarterly and continues to be both entertaining and a mine of useful information. It has won the Federation of Family History Societies' "*Elizabeth Simpson Award*" several times for the best magazine. As a result of increased publishing and postage costs members have the opportunity of receiving an electronic version of the magazine at a lower subscription rate but a significant number of members prefer to continue to receive the magazine in paper format. The journal is distributed to the major libraries, archive offices and local studies libraries throughout the historic county of Cheshire covering the following modern local authority areas: Cheshire East, Cheshire West and Chester, Wirral, Halton, Stockport, Trafford and Tameside. It is hoped that this will raise the Society's profile and attract members from those who are using these resource centres at the beginning of their family history journey.

Transcription, indexing and publications

Considerable time and effort continues to be put in by members to projects for the transcription and/or indexing of all sorts of written historical records and also of gravestones, war memorials and other relevant data. This benefits all those in this country and overseas who have Cheshire ancestry. The publication of these results online as downloads through the Society's online shop, in book form, or as CDs enables access for those who are unable to visit local Cheshire facilities through disability or distance. This is a public service that most or all family history societies, and other historical organisations, undertake.

Lectures

The Society is always ready to provide speakers to educate the public at formal education establishments or at meetings of other organisations, including those that do not have a historical focus. Our own meetings often include speakers on wider aspects of social, local, national and international history that put family history in context. These local group meetings are advertised locally and non-members are invited to attend. Beginner's days are run in various parts of the county and Family History Awareness and Heritage Days are run in local libraries and churches by group members of our society. Family history classes are also run at our research centre. The Society continues to investigate ways in which this part of its activities could be moved online.

Help Desk Advice

Some of our groups provide a help desk service in their local library and other community facilities for members of the public who are interested in tracing their family tree or need on-going advice. This service is for members and non-members alike, and is resuming after the pandemic restrictions.

Existing Services

Recent restrictions have limited the existing activities and services, for example book stall, journal distribution, evening classes in family history, day schools for beginners, group meetings, open days, publicity and research advice. These activities will continue to provide the backbone of our services and support to members and, through their endeavours, the wider public. A look-up service using our transcription records has been established at the Research Centre available to members. The online Forum and the website itself are another valuable tool for family historians, members and non-members alike and is proving an effective means of extending the services the Society can provide.

Co-operation with others

The society is a member of the Federation of Family History Societies and of the North West Group of Family History Societies and liaises with other family history societies, local Registrars, local studies officers and the media. There is good co-operation with the Cheshire Archives and Local Studies (CALS) and the Society continues to be actively engaged in the ongoing consultation on the future of the archive service within Cheshire and the role that the Society can have in these future developments. A Memorandum of Understanding was agreed with both the Cheshire Local Authorities as part of the bid for Heritage Lottery Funding for the Archives Project. The Society also works with the Wirral Archives Services, is a member of the Cheshire Local History Association and the Lancashire Parish Registers Society.

Volunteer Activities

The Society can only function through the work of its volunteers. A survey undertaken in the 2017-2018 reporting year indicated over 20,000 hours contributed by volunteers, equivalent to around 12 full time staff and over £150,000 at the national minimum wage. The Trustees would wish to acknowledge the debt that is owed to all those who give willingly of their time to further the objectives of the Society and for the benefit of the public.

Review

A primary aim of the committee is to maximise both the services available to members and the services that members provide to the public at large. The way in which these services are undertaken is reviewed regularly to ensure that advantage is taken of new opportunities.

ATTACHMENTS

List of trustees during the financial year ending 30th June 2023.

DECLARATION

Signed with the authority of the trustees,

Margaret Roberts
Chair

FHSC Trustee List

Those who occupied a position as Trustee of the Family History Society of Cheshire for the Reporting Year 1st July 2022 to 30th June 2023:

BENNETT Robert Alan,
DAVENPORT Peter,
GUYTON David,
HAMILTON Sheila,
JOHNSON Geoff,
JONES, Sheila
LAIDLAW Jean,
MARTIN Howard,
MITCHELL, Sheila,
MOORE Angela,
OLIVER Gay,
ROWLEY, Peter,
RUGMAN Rev Hazel,
SANT, Anthony,
SPATE Margaret,
SMETHAM David,
SMETHAM Lesley
THOMAS David,
WRIGHT Robert.

THE FAMILY HISTORY SOCIETY OF CHESHIRE
ACCOUNTS FOR THE
YEAR ENDED 30TH JUNE 2023

HEYWOOD SHEPHERD
CHARTERED ACCOUNTANTS

THE FAMILY HISTORY SOCIETY OF CHESHIRE

ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2023

STATEMENT OF INCOME & EXPENDITURE

	2023	2022
	£	£
INCOME		
Subscriptions (This year only)	22,469	22,622
Interest on Deposits	1,340	1,198
Gift Aid Refunds	-	3,625
Book Sales	40	136
Fiche Sales	-	6
CD Sales	136	263
Advertising	14	-
Research Rooms - Mobberley	1,110	780
Royalties	791	806
Website Income	1,178	1,009
Donations	110	-
Funds from Closed Groups	3,229	-
Total Income for year	<u>30,417</u>	<u>30,445</u>
EXPENDITURE		
Magazine Printing	5,973	5,275
Magazine Postage	5,030	4,473
Capitation to Groups	6,000	7,000
Grants to Groups	572	-
Royalties to Groups	45	-
Insurance & FFHS Subscription	1,588	1,431
Subscriptions	240	64
Book Purchases for Resale	500	1,129
CD Purchases for Resale	675	73
Membership Expenses	1,262	542
Research Rooms - Mobberley	10,865	10,243
Crewe Research Centre	163	50
Website Expenses	2,508	1,229
Committee Costs	345	36
Accountancy Charges	3,690	3,636
Other Expenditure	320	817
Depreciation	60	75
Total Expenditure for the year	<u>39,836</u>	<u>36,073</u>
(Deficit)/Surplus for the year	<u>(9,419)</u>	<u>(5,628)</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2023

BALANCE SHEET

	2023 £	2023 £	2022 £	2022 £
Tangible Fixed Assets				
Equipment at Cost	13,690		13,690	
Additions during year	-		-	
	<u>13,690</u>		<u>13,690</u>	
Less: Aggregate Depreciation	13,460		13,400	
		230		290
Furniture & Other Equipment at Cost	4,371		4,371	
Less: Aggregate Depreciation	<u>4,371</u>		<u>4,371</u>	
Microfiche Library at Cost	1,422		1,422	
Less: Aggregate Depreciation	<u>1,422</u>		<u>1,422</u>	
Mobberley Leasehold Improvements at Cost	5,759		5,759	
Less: Aggregate Depreciation	<u>5,759</u>		<u>5,759</u>	
Library Books at Cost		45,388		45,388
		<u>45,618</u>		<u>45,678</u>
Current Assets				
Stock	1,150		2,300	
Sundry Debtors	2,047		2,029	
Prepayments	3,639		3,407	
Cash at Bank	111,880		120,499	
Cash in Hand				
	<u>118,716</u>		<u>128,235</u>	
Current Liabilities				
Subscriptions Received in Advance	6,481		6,641	
Accruals	<u>1,248</u>		<u>1,248</u>	
	<u>7,729</u>		<u>7,889</u>	
Net Current Assets		110,987		120,346
TOTAL ASSETS		<u>156,605</u>		<u>166,024</u>
Financed by:				
Society Funds				
Balance at 1st July 2022		166,024		171,652
(Deficit)/Surplus for year		(9,419)		(5,628)
		<u>156,605</u>		<u>166,024</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2023

STATEMENT OF INCOME & EXPENDITURE

	2023 £	2022 £
INCOME		
Subscriptions (This year only)	22,469	22,622
Interest on Deposits	1,372	1,201
Gift Aid Refunds	-	3,625
Book Sales	321	240
Fiche Sales	-	6
CD Sales	136	263
Advertising	14	-
Research Rooms - Mobberley	1,110	780
Royalties	791	806
Donations	1,021	27
Other Income	763	339
Door Money	2,567	1,098
Website Income	1,178	1,009
Total Income for year	<u>31,742</u>	<u>32,016</u>
EXPENDITURE		
Magazine Printing	5,973	5,275
Magazine Postage	5,030	4,473
Insurance & FFHS Subscription	1,588	1,431
Subscriptions	240	64
Book Purchases for Resale	500	1,129
CD Purchases for Resale	675	73
Membership Expenses	1,262	542
Research Rooms - Mobberley	10,865	10,243
Crewe Research Centre	163	50
Website Expenses	2,508	1,229
Committee Costs	-	36
Room Hire	3,034	1,150
Accountancy Charges	3,690	3,636
Library Expenses	37	20
Other Expenditure	2,557	1,745
Speakers	2,846	3,316
Refreshments	418	113
Donations and Gratuities	100	20
Depreciation	818	480
Total Expenditure for the year	<u>42,304</u>	<u>35,025</u>
(Deficit)/Surplus for the year	<u>(10,562)</u>	<u>(3,009)</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2023

BALANCE SHEET

	2023 £	2023 £	2022 £	2022 £
Tangible Fixed Assets				
Equipment at Cost	54,135		54,135	
Additions during year	1,313		-	
	<u>55,448</u>		<u>54,135</u>	
Less: Aggregate Depreciation	26,691		26,148	
		28,757		27,987
Furniture & Other Equipment at Cost	27,381		27,381	
Additions during year	-		-	
	<u>27,381</u>		<u>27,381</u>	
Less: Aggregate Depreciation	23,083		22,893	
		4,298		4,488
Microfiche Library at Cost	1,422		1,422	
Less: Aggregate Depreciation	1,422		1,422	
		-		-
Library Books at Cost	76,020		76,020	
Less: Aggregate Depreciation	11,376		11,291	
		64,644		64,729
Mobberley Leasehold Improvements at Cost	5,759		5,759	
Less: Aggregate Depreciation	5,759		5,759	
		-		-
		<u>97,699</u>		<u>97,204</u>
Current Assets				
Stock	1,150		2,300	
Sundry Debtor	2,047		2,029	
Prepayments	3,639		3,407	
Cash at Bank	158,732		169,364	
Cash in Hand	906		591	
	<u>166,474</u>		<u>177,691</u>	
Current Liabilities				
Subscriptions Received in Advance	6,481		6,641	
Accruals	1,248		1,248	
	<u>7,729</u>		<u>7,889</u>	
Net Current Assets		158,745		169,802
TOTAL ASSETS		<u>256,444</u>		<u>267,006</u>
Financed by:				
Group Funds				
Balance at 1st July 2022	267,006		270,015	
(Deficit)/Surplus for year	<u>(10,562)</u>		<u>(3,009)</u>	
		256,444		267,006
		<u>256,444</u>		<u>267,006</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

INDEPENDENT EXAMINER'S REPORT TO THE MANAGING COMMITTEE

I report on the accounts of The Family History Society of Cheshire for the year ended 30th June 2023

Respective responsibilities of the Managing Committee and Examiner

As the association's Managing Committee, you are responsible for the preparation of the accounts; you consider that an audit is not required under section 144(2) of the Charities Act 2011 and that an independent examination is needed.

It is my responsibility to:

- * examine the accounts under section 145 of the 2011 Act;
- * follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- * 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 Association 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 you as trustees concerning 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 requirements:
 - * to keep accounting records (in accordance with section 130 of the 2011 Act); and
 - * to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Acthave not been met; or
- (2) to which, in my opinion, attention should have been drawn in order to enable a proper understanding of the accounts to be reached.



DAVID SOUTHALL
Chartered Accountant

1 Park Street
Macclesfield
Cheshire
SK11 6SR

4th October 2023

THE FAMILY HISTORY SOCIETY OF CHESHIRE

England & Wales - Charity number 515168

Accounts

THE FAMILY HISTORY SOCIETY OF CHESHIRE
(Charity no. 515168)

Trustees' Annual Report to the Charity Commission for the Year 2021-2022

OBJECTS

The object of the charity is to advance the education of the public in the study of family history in all its many aspects.

GOVERNING DOCUMENT

The charity is an unincorporated association governed by its constitution, originally set up around 1969 and currently the "1999 Constitution as amended 20th October 2001 and 30th October 2021".

CONTROL

Management of the Society is vested by the constitution in the trustees who are members of the executive committee, which meets three times a year, and consists of:

(a) Officers elected at the AGM:

Chairman
Secretary
Treasurer

and

Some Officials appointed to specific posts within the society

(b) Co-opted members and those who fill any casual vacancy

(c) One delegate representative from each of the 13 Local Groups and the Computer Club.

All trustees are unpaid.

Many committee members have individual responsibility for the day-to-day operations of specific functions. Reporting is via their membership of the Society's executive committee, supplemented in some cases by written reports. Sub-committees are sometimes set up to deal with particular issues. Of particular note is the permanent Financial Sub-committee, which has a major role in budgeting and financial overview.

The governance model for the Society was considered formally as part of the 2006/2007 Think Tank process. It did not reveal any need for change at that time. In the Spring of 2021, following advice from the Federation of Family History Societies, the Trustees and the Executive Committee reviewed the governance model to ensure that it reflected changes in the format of meetings and administrative procedures during the pandemic. They were also mindful that some of these changes had proved beneficial and that the Society's Constitution and governance model should be amended to enable the Society to benefit from the wider opportunities presented by the digital age. The amendments to the Society's administrative and meeting procedures and protocols included the ability to hold Annual General Meetings and other meetings on-line as well as in person, to vary the timings of meetings in exceptional circumstances, and to allow flexibility in the time periods for tenure of offices. These were presented to the Annual General Meeting on 30th October 2021 and were approved by those attending.

TRUSTEES

The Chairman for the reporting period 2021-2022 was Robert Alan Bennett of 8 Barford Drive, Lowton, Warrington WA3 1DD.

The charity's principal address is that of the Mobberley Research Centre, Rajar Building, Town Lane, Mobberley, WA16 7ER.

A list of the trustees is attached. It contains names of those who held that position during the financial year and who have continued up to the date of this document.

Preparation of new trustees for their general role as trustees is met by supplying a copy of Charity Commission guidance, Publication CC3, 'The essential Trustee' and copies of recent accounts and minutes of recent committee meetings. Some tasks undertaken by specific trustees require prior capability, such as financial literacy, or need induction training to cope with particular demands of the job.

PLANNING

The bulk of the Society's activities are planned in advance. However, some aspects of the society's activities are necessarily opportunistic rather than susceptible to considered planning. For example, library acquisitions depend on available funds and suitable works and collections coming up for sale or storage in an archive.

ADVISERS

The society is a member of the Federation of Family History Societies (FFHS). Membership brings with it advice on matters relevant to the conduct of the society's affairs, either from FFHS staff or from their legal advisers or insurers. The Society contracts out some accounting functions and this may include an element of advice. Advice is sometimes sought from members of the society who have suitable expertise.

RISK

There appear to be no major risks to which the Society is exposed that are not covered by the insurance arranged through the FFHS. Assets insurance is provided by Aviva Insurance.

DATA PROTECTION

The Society is committed to complying with all relevant data protection legislation.

INDEPENDENT EXAMINER

The constitution calls for an independent examiner or auditor to be appointed. The independent examiner for the period was Messrs. Heywood Shepherd, Chartered Accountants, 1 Park St, Macclesfield, Cheshire SK11 6SR.

ACCOUNTS

The accounts are presented on an accruals basis. The central accounts have been consolidated with the accounts of the computer club and the 13 local groups to generate the annual financial report. The Society is not registered for VAT, but is registered for VATMOSS in the Republic of Ireland for digital sales in the EU.

RESERVES

The total monetary assets (Net Current Assets) in the consolidated accounts are shown as:

£169,802

The committee has determined (report, December 1999) that the reserves within its central accounts should be targeted at between one third and two thirds of its annual subscription. These reserves consist of: working capital; funds for the purchase of research materials; equipment; renewal provision; and provision for unforeseen expenditure. For the year ending 30th June 2022 the annual subscription income was £22,622. Reserves are currently in excess of target. The trustees are satisfied that the reserves policy is appropriate and the level of reserves this year is suitable for the prevailing circumstances.

PUBLIC BENEFIT REPORTING REQUIREMENT

The next section charts the activities of the Society during the reporting year. This has been prepared with regard to the guidance in the Charity Commission's brochure PB1 "Charities and Public Benefit" published in September 2013.

ACTIVITIES, ACHIEVEMENTS and PUBLIC BENEFIT 2021-22

In accordance with public health restrictions and guidance during the pandemic, the Society's family history research centres at Mobberley and Crewe were closed and local group meetings were suspended. The reporting year 2021-2022 has seen the Society resume many of these activities. The Society's Executive Committee meetings have continued to be held online, an advantage since its membership is drawn from all parts of the historic County of Cheshire. The 2021 Annual General Meeting was an online event, but the added attraction of a nationally known speaker ensured that attendance was greater than in previous years, and out of County and worldwide members were able to participate in the functioning of their Society. This was repeated in 2022 with the same success. The Cheshire Family History Seminar Series of on-line talks and presentations by nationally known figures was a new initiative which commenced in the autumn of 2021 with monthly meetings. It was a great success with members from outside Cheshire and from overseas able to attend and to benefit from their membership of the Society. There is a full programme for 2022-2023.

Membership

A substantial percentage of the members now join via the internet and this facilitates our ability to address a geographically wide public. The Society has updated its membership forms to meet the changes required by the new GDPR regulations. A gradual decline in membership over recent years is a matter of concern to the Society. Renewals in 2022 continued to reflect that decline although many members continue to express their appreciation of the Society's response to the pandemic and to the new opportunities provided by online meetings. New members have joined as interest in family history expanded during the last two years. The challenge is to retain them. Given the circumstances membership numbers have held up well, supported by significant improvements in the arrangements for new members.

Mobberley Research Centre

The Mobberley Research Centre is at The Rajar Building, Town Lane, Mobberley, WA16 7ER. These premises provide light and bright accommodation, good access and space for the Society's extensive collection of documents and computer resources. The Macclesfield Newspaper Archive is now housed at the Research Centre.

The Rajar Building is owned by Mobberley Parish Council and was the subject of refurbishment with the aid of an S106 agreement following planning permission for new homes in the village.

The Research Centre is staffed by volunteers and is overseen by a Management Committee.

The Centre is the focus of our service provision, providing an invaluable resource for the Society in general and for members at the eastern side of the county in particular. It is open to non-members for a small donation. The multifunctional machines that handle media and copying continue to reinforce their value to the society and to make the wide range of resources available for research. The turnover of volunteers, who provide advice and support for visitors, to staff the centre remains low but, when people move on, it is usually possible to find suitable new volunteers. The Centre continues to respond to the increase in on-line genealogical information although *Find My Past*, *Ancestry* and *The Genealogist* websites, remain the preferred and cost-effective sites accessed by subscription, together with access to the many free to search sites.

Following Government guide-lines the Research Centre was closed for the entire 2020-2021 reporting year. Following a review of the situation and of all relevant risk assessments in the spring and summer of 2021 the Centre was successfully reopened in September 2021. Although visitor numbers remained low initially, they increased as people became more confident. The closure of the Centre has further delayed the Society's application to have the Centre become a Family Search Affiliate Library.

Crewe Family History Unit

This is based in the Crewe Municipal Building, in rooms provided by Cheshire East Council. It holds a good cross section of research material including free access to the same websites as the Mobberley Research Centre, local parish registers, an extensive library and the Crewe and District and South East Cheshire local history archives. The Unit is run by volunteers and opens two days a week and on occasional Saturdays. The Unit also has a space for talks and displays.

The Crewe Research Centre was also closed throughout the 2020-2021 reporting year. Preparations were made for re-opening and the appropriate risk assessments were completed but the Society did not get permission to re-open from Cheshire East Council until the Spring of 2022.

Internet presence

The Society's internet played a vital part in its response to the challenges of the pandemic and it has continued to provide an invaluable line of communication to members. There is a monthly newsletter, sent out to all members for whom it has an email address. This gives information, news and hints, advising members of upcoming events in the family history world and links to useful websites. The Society's presence on Facebook and Twitter has been enhanced and consolidated proving a valuable resource for members and non-members alike. All these areas of online activity are constantly reviewed and updated to ensure that the best information and encouragement is given.

The Society's website itself is reviewed constantly to allow improvement and updates following feedback from users. It is accessed by members and non-members alike. The Webmaster and his Web Assistant have ensured that members are fully cognisant of the opportunities the site offers. All group leaders can manage their own web presence in a time efficient way providing members with information about group activities and other local events and projects. Such activities, and the broader opportunities now available, enhance membership of the Society. Easily accessible information available on line for the general public raises the Society's profile and encourages new members to join and to pursue the study of family history. An active online Forum allows members and non-members to raise issues and problems they are facing in their research and to discuss possible solutions with other users. New members can thus benefit from the experience of others. The Members' only section of the site gives them access to documentation relevant to the society's activities. After an extensive, and ongoing, digitisation of its resources the Society's online shop offers a wide range of digitised resources for download and CDs for which it owns the copyright and other items of interest to family historians. The website also has links to other relevant family history sites where members and the general public can pursue their research. All of this benefits the society's members and researchers worldwide.

The Society also hosts and manages the website for the North West Group of Family History Societies.

Electronic projects

Electronic records of Cheshire related material are produced from the projects undertaken by our groups, volunteers, members and others. Microfiche and CD/DVD resources are being replaced as more of the Society's resources are digitised for download through the online shop and for placement on commercial family history sites.

Local Groups

The Society's local groups provide a focus for people in specific localities in Cheshire. A popular and important part of our work is undertaken by these groups, with group committee members providing local knowledge, organising talks, undertaking the collection of data and making this available worldwide, and helping members and the public with their research at local help desks in libraries and other community facilities. In the 2021-2022 reporting year the Society had 13 Local Groups operating across the historic County of Cheshire. Its Middlesex Group has been moribund for several years but after negotiation with other Family History Societies based in the North West it is hoped that members resident in or around the capital will be able to join others with family history roots in the North West

in a regional group.

2021-2022 saw the local groups resume their wider activities. Many had collaborated with neighbouring groups to offer online meetings to members during the lockdown period. The programmes devised for the 2021-2022 reporting period mixed face to face meetings with online sessions, local group leaders having recognised that these provided a benefit for out of county members with an interest in their local area. Some groups successfully experimented with hybrid meetings. Some local research, however, did discover that the traditional meeting continues to attract non-members to the Society's activities.

The Computer Club

The Computer Club plays an important role in providing advice on all aspects of the digital world, holding regular meetings to address current issues and problems and to look at new initiatives and sources of information relevant to family historians.

The Computer Club pioneered the use of online meetings discovering that more people attended than did a physical meeting and that members from all over the country, and elsewhere in the world, were willing and able to interact with the Society. Online working has also enabled small groups with particular interests to be formed which can then feed back to the Club and the Society.

Magazine

The society's magazine, the *Cheshire Ancestor*, remains a focus of communication with our members. It is produced quarterly and continues to be both entertaining and a mine of useful information. It has won the Federation of Family History Societies' "*Elizabeth Simpson Award*" several times for the best magazine. As a result of increased publishing and postage costs members have the opportunity of receiving an electronic version of the magazine at a lower subscription rate but a significant number of members prefer to continue to receive the magazine in paper format. The journal is distributed to the major libraries, archive offices and local studies libraries throughout the historic county of Cheshire covering the following modern local authority areas: Cheshire East, Cheshire West and Chester, Wirral, Halton, Stockport, Trafford and Tameside. It is hoped that this will raise the Society's profile and attract members from those who are using these resource centres at the beginning of their family history journey.

Transcription, indexing and publications

Considerable time and effort continues to be put in by members to projects for the transcription and/or indexing of all sorts of written historical records and also of gravestones, war memorials and other relevant data. This benefits all those in this country and overseas who have Cheshire ancestry. The publication of these results online as downloads through the Society's online shop, in book form, or as CDs enables access for those who are unable to visit local Cheshire facilities through disability or distance. This is a public service that most or all family history societies, and other historical organisations, undertake.

Lectures

The Society is always ready to provide speakers to educate the public at formal education establishments or at meetings of other organisations, including those that do not have a historical focus. Our own meetings often include speakers on wider aspects of social, local, national and international history that put family history in context. These local group meetings are advertised locally and non-members are invited to attend. Beginner's days are run in various parts of the county and Family History Awareness and Heritage Days are run in local libraries and churches by group members of our society. Family history classes are also run at our research centre. The Society continues to investigate ways in which this part of its activities could be moved online.

Help Desk Advice

Some of our groups provide a help desk service in their local library and other community facilities for

members of the public who are interested in tracing their family tree or need on-going advice. This service is for members and non-members alike, and is resuming after the pandemic restrictions.

Existing Services

Recent restrictions have limited the existing activities and services, for example book stall, journal distribution, evening classes in family history, day schools for beginners, group meetings, open days, publicity and research advice. These activities will continue to provide the backbone of our services and support to members and, through their endeavours, the wider public. A look-up service using our transcription records has been established at the Research Centre available to members. The online Forum and the website itself are another valuable tool for family historians, members and non-members alike and is proving an effective means of extending the services the Society can provide.

Co-operation with others

The society is a member of the Federation of Family History Societies and of the North West Group of Family History Societies and liaises with other family history societies, local Registrars, local studies officers and the media. There is good co-operation with the Cheshire Archives and Local Studies (CALs) and the Society continues to be actively engaged in the ongoing consultation on the future of the archive service within Cheshire and the role that the Society can have in these future developments. A Memorandum of Understanding was agreed with both the Cheshire Local Authorities as part of the bid for Heritage Lottery Funding for the Archives Project. The Society also works with the Wirral Archives Services, is a member of the Cheshire Local History Association and the Lancashire Parish Registers Society.

Volunteer Activities

The Society can only function through the work of its volunteers. A survey undertaken in the 2017-2018 reporting year indicated over 20,000 hours contributed by volunteers, equivalent to around 12 full time staff and over £150,000 at the national minimum wage. The Trustees would wish to acknowledge the debt that is owed to all those who give willingly of their time to further the objectives of the Society and for the benefit of the public.

Review

A primary aim of the committee is to maximise both the services available to members and the services that members provide to the public at large. The way in which these services are undertaken is reviewed regularly to ensure that advantage is taken of new opportunities.

ATTACHMENTS

List of trustees during the financial year ending 30th June 2022.

DECLARATION

Signed with the authority of the trustees,


Robert Alan Bennett (Feb 2, 2023 15:27 GMT)

R.A.Bennett

Chairman
21st January 2023

FHSC Trustee List

Those who occupied a position as Trustee of the Family History Society of Cheshire for the Reporting Year 1st July 2021 to 30th June 2022:

BENNETT Robert Alan,
DAVENPORT Peter,
GUYTON David,
HAMILTON Sheila,
JOHNSON Geoff,
LAIDLAW Jean,
MARTIN Howard,
MITCHELL, Sheila,
MOORE Angela,
OLIVER Gay,
ROWLEY, Peter,
RUGMAN Rev Hazel,
SANT, Anthony,
SPATE Margaret,
SMETHAM David,
SMETHAM Lesley
THOMAS David,
WRIGHT Robert.

THE FAMILY HISTORY SOCIETY OF CHESHIRE

**ACCOUNTS FOR THE
YEAR ENDED 30TH JUNE 2022**

**HEYWOOD SHEPHERD
CHARTERED ACCOUNTANTS**

THE FAMILY HISTORY SOCIETY OF CHESHIRE

ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2022

STATEMENT OF INCOME & EXPENDITURE

	2022	2021
	£	£
INCOME		
Subscriptions (This year only)	22,622	25,297
Interest on Deposits	1,198	1,468
Gift Aid Refunds	3,625	-
Book Sales	136	143
Fiche Sales	6	19
CD Sales	263	702
Research Rooms - Mobberley	780	-
Royalties	806	1,071
Website Income	1,009	819
Total Income for year	<u>30,445</u>	<u>29,519</u>
EXPENDITURE		
Magazine Printing	5,275	5,335
Magazine Postage	4,473	4,039
Capitation to Groups	7,000	7,000
Insurance & FFHS Subscription	1,431	1,623
Subscriptions	64	65
Book Purchases for Resale	1,129	374
CD Purchases for Resale	73	82
Membership Expenses	542	312
Research Rooms - Mobberley	10,243	10,008
Crewe Research Centre	50	614
Projects	-	167
Website Expenses	1,229	942
Committee Costs	36	40
Accountancy Charges	3,636	3,390
Other Expenditure	817	904
Depreciation	75	90
Total Expenditure for the year	<u>36,073</u>	<u>34,985</u>
(Deficit)/Surplus for the year	<u>(5,628)</u>	<u>(5,466)</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2022

BALANCE SHEET

	2022 £	2022 £	2021 £	2021 £
Tangible Fixed Assets				
Equipment at Cost	13,690		13,690	
Additions during year	-		-	
	<u>13,690</u>		<u>13,690</u>	
Less: Aggregate Depreciation	<u>13,400</u>		<u>13,325</u>	
		290		365
Furniture & Other Equipment at Cost	4,371		4,371	
Less: Aggregate Depreciation	<u>4,371</u>		<u>4,371</u>	
		-		-
Microfiche Library at Cost	1,422		1,422	
Less: Aggregate Depreciation	<u>1,422</u>		<u>1,422</u>	
		-		-
Mobberley Leasehold Improvements at Cost	5,759		5,759	
Less: Aggregate Depreciation	<u>5,759</u>		<u>5,759</u>	
		-		-
Library Books at Cost		<u>45,388</u>		<u>45,388</u>
		45,678		45,753
Current Assets				
Stock	2,300		3,406	
Sundry Debtors	2,029		2,032	
Prepayments	3,407		3,144	
Cash at Bank	120,499		126,783	
Cash in Hand	-		50	
	<u>128,235</u>		<u>135,415</u>	
Current Liabilities				
Subscriptions Received in Advance	6,641		7,020	
Accruals	<u>1,248</u>		<u>2,496</u>	
	7,889		9,516	
Net Current Assets		120,346		125,899
TOTAL ASSETS		<u>166,024</u>		<u>171,652</u>
Financed by:				
Society Funds				
Balance at 1st July 2021		171,652		177,118
(Deficit)/Surplus for year		(5,628)		(5,466)
		<u>166,024</u>		<u>171,652</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2022

STATEMENT OF INCOME & EXPENDITURE

	2022	2021
	£	£
INCOME		
Subscriptions (This year only)	22,622	25,297
Interest on Deposits	1,201	1,470
Gift Aid Refunds	3,625	-
Book Sales	240	137
Fiche Sales	6	19
CD Sales	263	749
Research Rooms - Mobberley	780	-
Royalties	806	1,071
Donations	27	100
Other Income	339	221
Door Money	1,098	30
Project Income	-	80
Website Income	1,009	819
Total Income for year	<u>32,016</u>	<u>29,993</u>
EXPENDITURE		
Magazine Printing	5,275	5,335
Magazine Postage	4,473	4,039
Insurance & FFHS Subscription	1,431	1,623
Subscriptions	64	65
Book Purchases for Resale	1,129	374
CD Purchases for Resale	73	81
Membership Expenses	542	312
Research Rooms - Mobberley	10,243	10,008
Crewe Research Centre	50	614
Projects	-	207
Website Expenses	1,229	942
Committee Costs	36	40
Room Hire	1,150	164
Accountancy Charges	3,636	3,390
Library Expenses	20	-
Other Expenditure	1,745	1,802
Speakers	3,316	1,627
Refreshments	113	-
Donations and Gratuities	20	20
Depreciation	480	630
Total Expenditure for the year	<u>35,025</u>	<u>31,273</u>
(Deficit)/Surplus for the year	<u>(3,009)</u>	<u>(1,280)</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2022

BALANCE SHEET

	2022 £	2022 £	2021 £	2021 £
Tangible Fixed Assets				
Equipment at Cost	54,135		54,135	
Additions during year	-		-	
	<u>54,135</u>		<u>54,135</u>	
Less: Aggregate Depreciation	26,148		25,868	
		27,987		28,267
Furniture & Other Equipment at Cost	27,381		27,381	
Additions during year	-		-	
	<u>27,381</u>		<u>27,381</u>	
Less: Aggregate Depreciation	22,893		22,803	
		4,488		4,578
Microfiche Library at Cost	1,422		1,422	
Less: Aggregate Depreciation	1,422		1,422	
		-		-
Library Books at Cost	76,020		76,020	
Less: Aggregate Depreciation	11,291		11,181	
		64,729		64,839
Mobberley Leasehold Improvements at Cost	5,759		5,759	
Less: Aggregate Depreciation	5,759		5,759	
		-		-
		<u>97,204</u>		<u>97,684</u>
Current Assets				
Stock	2,300		3,406	
Sundry Debtor	2,029		2,032	
Prepayments	3,407		3,144	
Cash at Bank	169,364		172,474	
Cash in Hand	591		791	
	<u>177,691</u>		<u>181,847</u>	
Current Liabilities				
Subscriptions Received in Advance	6,641		7,020	
Accruals	1,248		2,496	
	<u>7,889</u>		<u>9,516</u>	
Net Current Assets		169,802		172,331
TOTAL ASSETS		<u>267,006</u>		<u>270,015</u>
Financed by:				
Group Funds				
Balance at 1st July 2021	270,015		271,295	
(Deficit)/Surplus for year	<u>(3,009)</u>		<u>(1,280)</u>	
		267,006		270,015
		<u>267,006</u>		<u>270,015</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

INDEPENDENT EXAMINER'S REPORT TO THE MANAGING COMMITTEE

I report on the accounts of The Family History Society of Cheshire for the year ended 30th June 2022

Respective responsibilities of the Managing Committee and Examiner

As the association's Managing Committee, you are responsible for the preparation of the accounts; you consider that an audit is not required under section 144(2) of the Charities Act 2011 and that an independent examination is needed.

It is my responsibility to:

- * examine the accounts under section 145 of the 2011 Act;
- * follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- * state whether particular matters have come to my attention.

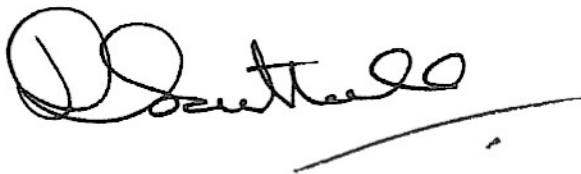
Basis of Independent Examiner's Report

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 Association 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 you as trustees concerning 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 requirements:
 - * to keep accounting records (in accordance with section 130 of the 2011 Act); and
 - * to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Acthave not been met; or
- (2) to which, in my opinion, attention should have been drawn in order to enable a proper understanding of the accounts to be reached.



DAVID SOUTHALL
Chartered Accountant

1 Park Street
Macclesfield
Cheshire
SK11 6SR

21st October 2022

THE FAMILY HISTORY SOCIETY OF CHESHIRE

INDEPENDENT EXAMINER'S REPORT TO THE MANAGING COMMITTEE

I report on the accounts of The Family History Society of Cheshire for the year ended 30th June 2022

Respective responsibilities of the Managing Committee and Examiner

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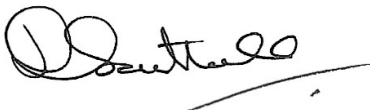
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 - * to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Acthave not been met; or
- (2) to which, in my opinion, attention should have been drawn in order to enable a proper understanding of the accounts to be reached.



DAVID SOUTHALL
Chartered Accountant

1 Park Street
Macclesfield
Cheshire
SK11 6SR

21st October 2022

THE FAMILY HISTORY SOCIETY OF CHESHIRE

England & Wales - Charity number 515168

Accounts

THE FAMILY HISTORY SOCIETY OF CHESHIRE
(Charity no. 515168)

Trustees' Annual Report to the Charity Commission for the Year 2020-2021

OBJECTS

The object of the charity is to advance the education of the public in the study of family history in all its many aspects.

GOVERNING DOCUMENT

The charity is an unincorporated association governed by its constitution, originally set up around 1969 and currently the "1999 Constitution as amended 20 October 2001"

CONTROL

Management of the Society is vested by the constitution in the trustees who are members of the executive committee, which meets three times a year, and consists of:

(a) Officers elected at the AGM:

Chairman
Secretary
Treasurer

and

Some Officials appointed to specific posts within the society

(b) Co-opted members and those who fill any casual vacancy

(c) One delegate representative from each of the 13 Local Groups and the Computer Club.

All trustees are unpaid.

Many committee members have individual responsibility for the day-to-day operations of specific functions. Reporting is via their membership of the Society's executive committee, supplemented in some cases by written reports. Sub-committees are sometimes set up to deal with particular issues. Of particular note is the permanent Financial Sub-committee, which has a major role in budgeting and financial overview.

The governance model for the Society was considered formally as part of the 2006/2007 Think Tank process. It did not reveal any need for change at that time. The Trustees and the Executive Committee reviewed the governance model in the spring of 2021. Consequent to that review and following advice from the Federation of Family History Societies they intend to present a series of amendments, that would update the Society's administrative and meeting procedures and protocols to reflect the changes forced on it by the Covid 19 emergency and the opportunities presented by the digital age, to the Annual General Meeting to be held on 31st October 2021, outside the current reporting year.

TRUSTEES

The Chairman for the reporting period 2020-2021 was Robert Alan Bennett of 8 Barford Drive, Lowton, Warrington WA3 1DD.

The charity's principal address is that of the Mobberley Research Centre, Rajar Building, Town Lane, Mobberley, WA16 7ER.

A list of the trustees is attached. It contains names of those who held that position during the financial year and who have continued up to the date of this document.

Preparation of new trustees for their general role as trustees is met by supplying a copy of Charity Commission guidance, Publication CC3, 'The essential Trustee' and copies of recent accounts and minutes of recent committee meetings. Some tasks undertaken by specific trustees require prior

capability, such as financial literacy, or need induction training to cope with particular demands of the job.

PLANNING

The bulk of the Society's activities are planned in advance. However, some aspects of the society's activities are necessarily opportunistic rather than susceptible to considered planning. For example, library acquisitions depend on available funds and suitable works and collections coming up for sale or storage in an archive.

ADVISERS

The society is a member of the Federation of Family History Societies (FFHS). Membership brings with it advice on matters relevant to the conduct of the society's affairs, either from FFHS staff or from their legal advisers or insurers. The Society contracts out some accounting functions and this may include an element of advice. Advice is sometimes sought from members of the society who have suitable expertise.

RISK

There appear to be no major risks to which the Society is exposed that are not covered by the insurance arranged through the FFHS. Assets insurance is provided by Aviva Insurance.

DATA PROTECTION

The Society is committed to complying with all relevant data protection legislation.

INDEPENDENT EXAMINER

The constitution calls for an independent examiner or auditor to be appointed. The independent examiner for the period was Messrs. Heywood Shepherd, Chartered Accountants, 1 Park St, Macclesfield, Cheshire SK11 6SR.

ACCOUNTS

The accounts are presented on an accruals basis. The central accounts have been consolidated with the accounts of the computer club and the 13 local groups to generate the annual financial report. The Society is not registered for VAT, but is registered for VATMOSS in the Republic of Ireland for digital sales in the EU.

RESERVES

The total monetary assets (Net Current Assets) in the consolidated accounts are shown as:

£172,331

The committee has determined (report, December 1999) that the reserves within its central accounts should be targeted at between one third and two thirds of its annual subscription. These reserves consist of: working capital; funds for the purchase of research materials; equipment; renewal provision; and provision for unforeseen expenditure. For the year ending 30th June 2021 the annual subscription income was £25,297. Reserves are currently in excess of target. The trustees are satisfied that the reserves policy is appropriate and the level of reserves this year is suitable for the prevailing circumstances.

PUBLIC BENEFIT REPORTING REQUIREMENT

The next section charts the activities of the Society during the reporting year. This has been prepared with regard to the guidance in the Charity Commission's brochure PB1 "Charities and Public Benefit" published in September 2013.

ACTIVITIES, ACHIEVEMENTS and PUBLIC BENEFIT 2020-2021

The reporting year 2020-2021 has been challenging for the Society but it has responded effectively to it. During the 2019-2020 reporting year the Trustees and the Executive Committee began holding their

meetings online using Zoom. Before the end of the last reporting year the Computer Club had moved all of its activities online. During the current reporting year several Local Groups, either in pairs or as single units followed suit and began to successfully hold meetings online. The Society purchased Zoom licences. The 2020 Annual General Meeting, held online, attracted members from overseas and outside Cheshire. The benefits to the Society's wider membership were quickly realised as more and more members living outside the county could participate in its online activities. The Executive Committee, therefore, took the decision that for the 2021-2022 meeting and reporting year a Family History Society of Cheshire Seminar Series of talks and activities should be held monthly in parallel with the usual meetings of the Local Groups. These would be advertised to all members, would be held on Zoom with speakers of national reputation and standing in the family history world being engaged.

Membership

A substantial percentage of the members now join via the internet and this facilitates our ability to address a geographically wide public. The Society has updated its membership forms to meet the changes required by the new GDPR regulations. A gradual decline in membership over recent years is a matter of concern to the Society. Renewals in 2021 continued that decline although many members continue to express their appreciation of the Society's response to the pandemic and new members have joined as interest in family history expanded during the lockdowns. Given the circumstances membership numbers have held up well, supported by significant improvements in the arrangements for new members.

Mobberley Research Centre

The Mobberley Research Centre is at The Rajar Building, Town Lane, Mobberley, WA16 7ER. These premises provide light and bright accommodation, good access and space for the Society's extensive collection of documents and computer resources. The Macclesfield Newspaper Archive is now housed at the Research Centre.

The Rajar Building is owned by Mobberley Parish Council and was the subject of refurbishment with the aid of an S106 agreement following planning permission for new homes in the village.

The Research Centre is staffed by volunteers and is overseen by a Management Committee.

The Centre is the focus of our service provision, providing an invaluable resource for the Society in general and for members at the eastern side of the county in particular. It is open to non-members for a small donation. The multifunctional machines that handle media and copying continue to reinforce their value to the society and to make the wide range of resources available for research. The turnover of volunteers, who provide advice and support for visitors, to staff the centre remains low but, when people move on, it is usually possible to find suitable new volunteers. The Centre continues to respond to the increase in on-line genealogical information although *Find My Past*, *Ancestry* and *The Genealogist* websites, remain the preferred and cost-effective sites accessed by subscription, together with access to the many free to search sites.

Following Government guide-lines the Research Centre was closed for the entire 2020-2021 reporting year. Following a review of the situation and of all relevant risk assessments in the spring and summer of 2021 it was decided to re-open the Centre in September 2021. The closure of the Centre has further delayed the Society's application to have the Centre become a Family Search Affiliate Library.

Crewe Family History Unit

This is based in the Crewe Municipal Building, in rooms provided by Cheshire East Council. It holds a good cross section of research material including free access to the same websites as the Mobberley Research Centre, local parish registers, an extensive library and the Crewe and District and South East Cheshire local history archives. The Unit is run by volunteers and opens two days a week and on occasional Saturdays. The Unit also has a space for talks and displays.

The Crewe Research Centre was also closed throughout the 2020-2021 reporting year. Preparations have been made for re-opening and the appropriate risk assessments have been completed but the Society is still awaiting permission to proceed with re-opening from Cheshire East Council.

Internet presence

The Society's internet activity has played a vital part in its response to the challenges of the pandemic. It has provided an invaluable line of communication to members through the regular Monthly Lockdown Newsletters full of information, news and hints, and newsletters advising members of events and activities being held online. The Society's presence on Facebook and Twitter has been enhanced and consolidated proving a valuable resource for members and non-members alike. All these areas of online activity are constantly reviewed and updated to ensure that the best information and encouragement is given.

The Society's website itself is reviewed constantly to allow improvement and updates following feedback from users. It is accessed by members and non-members alike. The Webmaster and his Web Assistant have ensured that members are fully cognisant of the opportunities the site offers. All group leaders can manage their own web presence in a time efficient way providing members with information about group activities and other local events and projects. Such activities, and the broader opportunities now available, enhance membership of the Society. Easily accessible information available on line for the general public raises the Society's profile and encourages new members to join and to pursue the study of family history. An active online Forum allows members and non-members to raise issues and problems they are facing in their research and to discuss possible solutions with other users. New members can thus benefit from the experience of others. The Members' only section of the site gives them access to documentation relevant to the society's activities. After an extensive, and ongoing, digitisation of its resources the Society successfully launched its online shop selling digitised resources for download and CDs for which it owns the copyright and other items of interest to family historians. The website also has links to other relevant family history sites where members and the general public can pursue their research. All of this benefits the society's members and researchers worldwide.

The Society also hosts and manages the website for the North West Group of Family History Societies.

Electronic projects

Electronic records of Cheshire related material are produced from the projects undertaken by our groups, volunteers, members and others. Microfiche and CD/DVD resources are being replaced as more of the Society's resources are digitised for download through the online shop and for placement on commercial family history sites.

Local Groups

The Society's local groups provide a focus for people in specific localities in Cheshire. A popular and important part of our work is undertaken by these groups, with group committee members providing local knowledge, organising talks, undertaking the collection of data and making this available worldwide, and helping members and the public with their research at local help desks in libraries and other community facilities. In the 2020-2021 reporting year the Society had 13 Local Groups operating across the historic County of Cheshire. Its Middlesex Group has been defunct for several years but after negotiation with other Family History Societies based in the North West it is hoped that a London Group for those with family history roots in the North West can be established.

Following the success of the Computer Club's online Zoom meetings local groups began to plan programmes for autumn 2020 using Zoom, often in collaboration with neighbouring groups. The response from members to this has been very positive. Group Leaders have continued to keep in contact with their members through their own newsletters.

The Computer Club

The Computer Club plays an important role in providing advice on all aspects of the digital world,

holding regular meetings to address current issues and problems and to look at new initiatives and sources of information relevant to family historians.

The Computer Club pioneered the use of online meetings discovering that more people attended than did a physical meeting and that members from all over the country, and elsewhere in the world, were willing and able to interact with the Society.

Magazine

The society's magazine, the *Cheshire Ancestor*, remains a focus of communication with our members. It is produced quarterly and continues to be both entertaining and a mine of useful information. It has won the Federation of Family History Societies' "*Elizabeth Simpson Award*" several times for the best magazine. As a result of increased publishing and postage costs members have the opportunity of receiving an electronic version of the magazine at a lower subscription rate but a significant number of members prefer to continue to receive the magazine in paper format. The journal is distributed to the major libraries, archive offices and local studies libraries throughout the historic county of Cheshire covering the following modern local authority areas: Cheshire East, Cheshire West and Chester, Wirral, Halton, Stockport, Trafford and Tameside. It is hoped that this will raise the Society's profile and attract members from those who are using these resource centres at the beginning of their family history journey.

Transcription, indexing and publications

Considerable time and effort continues to be put in by members to projects for the transcription and/or indexing of all sorts of written historical records and also of gravestones, war memorials and other relevant data. This benefits all those in this country and overseas who have Cheshire ancestry. The publication of these results online as downloads through the Society's online shop, in book form, or as CDs enables access for those who are unable to visit local Cheshire facilities through disability or distance. This is a public service that most or all family history societies, and other historical organisations, undertake.

Lectures

Although continuing Covid restrictions have made the Society's wider role more difficult to fulfil our members educate the public at formal education establishments and by providing speakers at meetings of other organisations, including those that do not have a historical focus. Our own meetings often include speakers on wider aspects of social, local, national and international history that put family history in context. Beginner's days are run in various parts of the county and Family History Awareness and Heritage Days are run in local libraries and churches by group members of our society. Family history classes are also run at our research centre. The Society continues to investigate ways in which this part of its activities could be moved online.

Help Desk Advice

Some of our groups provide a help desk service in their local library and other community facilities for members of the public who are interested in tracing their family tree or need on-going advice. This service is for members and non-members alike. Unfortunately, this service came to a temporary halt with the closure of local libraries and out a concern for the health of both our members and the general public.

Existing Services

Restriction have limited the existing activities and services, for example book stall, journal distribution, evening classes in family history, day schools for beginners, group meetings, open days, publicity and research advice that continue to provide the backbone of our services and support to members and, through their endeavours, the wider public. A look-up service using our transcription records has been established at the Research Centre available to members. The online Forum and the website itself are another valuable tool for family historians, members and non-members alike and is proving an effective

means of extending the services the Society can provide.

Co-operation with others

The society is a member of the Federation of Family History Societies and of the North West Group of Family History Societies and liaises with other family history societies, local Registrars, local studies officers and the media. There is good co-operation with the Cheshire County Record Office, and the Society continues to be actively engaged in the ongoing consultation on the future of the archive service within Cheshire and the role that the Society can have in these future developments. The Society also works with the Wirral Archives Services and is a member of the Cheshire Local History Association and the Lancashire Parish Registers Society.

Volunteer Activities

The Society can only function through the work of its volunteers. A survey undertaken in the 2017-2018 reporting year indicated over 20,000 hours contributed by volunteers, equivalent to around 12 full time staff and over £150,000 at the national minimum wage. The Trustees would wish to acknowledge the debt that is owed to all those who give willingly of their time to further the objectives of the Society and for the benefit of the public.

Review

A primary aim of the committee is to maximise both the services available to members and the services that members provide to the public at large. The way in which these services are undertaken is reviewed regularly to ensure that advantage is taken of new opportunities.

ATTACHMENTS

List of trustees during the financial year ending 30th June 2021.

DECLARATION

Signed with the authority of the trustees,

R.A.Bennett

Chairman

22nd January 2022

FHSC Trustee List

Those who occupied a position as Trustee of the Family History Society of Cheshire all of the year 1st July 2020 to 30th June 2021:

BENNETT Robert Alan,
DAVENPORT Peter,
GUYTON David,
HAMILTON Sheila,
JOHNSON Geoff,
LAIDLAW Jean,
MARTIN Howard,
MITCHELL, Sheila,
MOORE Angela,
OLIVER Gay,
ROWLEY, Peter,
RUGMAN Rev Hazel,
SANT, Anthony,
SPATE Margaret,
SMETHAM David,
SMETHAM Lesley
THOMAS David,
WRIGHT Robert.

THE FAMILY HISTORY SOCIETY OF CHESHIRE
ACCOUNTS FOR THE
YEAR ENDED 30TH JUNE 2021

HEYWOOD SHEPHERD
CHARTERED ACCOUNTANTS

THE FAMILY HISTORY SOCIETY OF CHESHIRE

ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2021

Statement of Income & Expenditure

	2021	2020
	£	£
INCOME		
Subscriptions (This year only)	25,297	24,863
Interest on Deposits	1,468	1,148
Gift Aid Refunds	-	3,761
Book Sales	143	1,133
Fiche Sales	19	-
CD Sales	702	339
Research Rooms - Mobberley	-	1,225
Royalties	1,071	940
Website Income	819	1,209
Donations	-	26
Total Income for year	<u>29,519</u>	<u>34,644</u>
EXPENDITURE		
Magazine Printing	5,335	6,000
Magazine Postage	4,039	5,246
Capitation to Groups	7,000	7,000
Grants to Groups	-	452
Insurance & FFHS Subscription	1,623	1,746
Subscriptions	65	65
Book Purchases for Resale	374	540
CD Purchases for Resale	82	118
Membership Expenses	312	330
Research Rooms - Mobberley	10,008	10,758
Crewe Research Centre	614	973
Projects	167	173
Website Expenses	942	1,613
Committee Costs	40	829
Accountancy Charges	3,390	3,420
Other Expenditure	904	340
Depreciation	90	115
Total Expenditure for the year	<u>34,985</u>	<u>39,718</u>
(Deficit)/Surplus for the year	<u>(5,466)</u>	<u>(5,074)</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2021

Balance Sheet

	2021 £	2021 £	2020 £	2020 £
Tangible Fixed Assets				
Equipment at Cost	13,690		13,190	
Additions during year	-		500	
	<u>13,690</u>		<u>13,690</u>	
Less: Aggregate Depreciation	<u>13,325</u>		<u>13,235</u>	
		365		455
Furniture & Other Equipment at Cost	4,371		4,371	
Less: Aggregate Depreciation	<u>4,371</u>		<u>4,371</u>	
		-		-
Microfiche Library at Cost	1,422		1,422	
Less: Aggregate Depreciation	<u>1,422</u>		<u>1,422</u>	
		-		-
Mobberley Leasehold Improvements at Cost	5,759		5,759	
Less: Aggregate Depreciation	<u>5,759</u>		<u>5,759</u>	
		-		-
Library Books at Cost		<u>45,388</u>		<u>45,388</u>
		45,753		45,843
Current Assets				
Stock	3,406		3,625	
Sundry Debtors	2,032		5,609	
Prepayments	3,144		4,095	
Cash at Bank	126,783		123,934	
Cash in Hand	50		50	
	<u>135,415</u>		<u>137,313</u>	
Current Liabilities				
Subscriptions Received in Advance	7,020		4,652	
Accruals	<u>2,496</u>		<u>1,386</u>	
	9,516		6,038	
Net Current Assets		125,899		131,275
TOTAL ASSETS		<u>171,652</u>		<u>177,118</u>
Financed by:				
Society Funds				
Balance at 1st July 2020		177,118		182,192
(Deficit)/Surplus for year		(5,466)		(5,074)
		<u>171,652</u>		<u>177,118</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2021

Statement of Income & Expenditure

	2021	2020
	£	£
INCOME		
Subscriptions (This year only)	25,297	24,863
Interest on Deposits	1,470	1,157
Gift Aid Refunds	-	3,761
Book Sales	137	1,313
Fiche Sales	19	-
CD Sales	749	406
Research Rooms - Mobberley	-	1,225
Royalties	1,071	940
Donations	100	330
Other Income	221	274
Door Money	30	3,222
Group Trips	-	390
Project Income	80	50
Website Income	819	1,209
Total Income for year	<u>29,993</u>	<u>39,140</u>
EXPENDITURE		
Magazine Printing	5,335	6,000
Magazine Postage	4,039	5,246
Insurance & FFHS Subscription	1,623	1,746
Subscriptions	65	65
Book Purchases for Resale	374	540
CD Purchases for Resale	81	118
Membership Expenses	312	330
Research Rooms - Mobberley	10,008	10,758
Crewe Research Centre	614	973
Projects	207	343
Stationery, Postage, Telephone, Travel etc	-	441
Website Expenses	942	1,613
Committee Costs	40	829
Room Hire	164	2,640
Accountancy Charges	3,390	3,420
Library Expenses	-	42
Other Expenditure	1,802	967
Speakers	1,627	2,266
Refreshments	-	776
Group Visits	-	417
Donations and Gratuities	20	25
Depreciation	630	804
Total Expenditure for the year	<u>31,273</u>	<u>40,359</u>
(Deficit)/Surplus for the year	<u>(1,280)</u>	<u>(1,219)</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2021

Balance Sheet

	2021 £	2021 £	2020 £	2020 £
Tangible Fixed Assets				
Equipment at Cost	54,135		53,246	
Additions during year			889	
	<u>54,135</u>		<u>54,135</u>	
Less: Aggregate Depreciation	25,868		25,508	
		28,267		28,627
Furniture & Other Equipment at Cost	27,381		27,341	
Additions during year	-		40	
	<u>27,381</u>		<u>27,381</u>	
Less: Aggregate Depreciation	22,803		22,668	
		4,578		4,713
Microfiche Library at Cost	1,422		1,422	
Less: Aggregate Depreciation	<u>1,422</u>		<u>1,422</u>	
		-		-
Library Books at Cost	76,020		76,020	
Less: Aggregate Depreciation	<u>11,181</u>		<u>11,046</u>	
		64,839		64,974
Mobberley Leasehold Improvements at Cost	5,759		5,759	
Less: Aggregate Depreciation	<u>5,759</u>		<u>5,759</u>	
		-		-
		<u>97,684</u>		<u>98,314</u>
Current Assets				
Stock	3,406		3,625	
Sundry Debtor	2,032		5,609	
Prepayments	3,144		4,095	
Cash at Bank	172,474		164,676	
Cash in Hand	791		1,014	
	<u>181,847</u>		<u>179,019</u>	
Current Liabilities				
Subscriptions Received in Advance	7,020		4,652	
Accruals	<u>2,496</u>		<u>1,386</u>	
	9,516		6,038	
Net Current Assets		172,331		172,981
TOTAL ASSETS		<u>270,015</u>		<u>271,295</u>
Financed by:				
Group Funds				
Balance at 1st July 2020	271,295		272,514	
(Deficit)/Surplus for year	<u>(1,280)</u>		<u>(1,219)</u>	
		270,015		271,295
		<u>270,015</u>		<u>271,295</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

Independent Examiner's Report to the Managing Committee

I report on the accounts of The Family History Society of Cheshire for the year ended 30th June 2021

Respective responsibilities of the Managing Committee and Examiner

As the association's Managing Committee, you are responsible for the preparation of the accounts; you consider that an audit is not required under section 144(2) of the Charities Act 2011 and that an independent examination is needed.

It is my responsibility to:

- * examine the accounts under section 145 of the 2011 Act;
- * follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- * 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 Association 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 you as trustees concerning 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 requirements:
 - * to keep accounting records (in accordance with section 130 of the 2011 Act); and
 - * to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Acthave not been met; or
- (2) to which, in my opinion, attention should have been drawn in order to enable a proper understanding of the accounts to be reached.



DAVID SOUTHALL
Chartered Accountant

1 Park Street
Macclesfield
Cheshire
SK11 6SR

13th October 2021

THE FAMILY HISTORY SOCIETY OF CHESHIRE

Independent Examiner's Report to the Managing Committee

I report on the accounts of The Family History Society of Cheshire for the year ended 30th June 2021

Respective responsibilities of the Managing Committee and Examiner

As the association's Managing Committee, you are responsible for the preparation of the accounts; you consider that an audit is not required under section 144(2) of the Charities Act 2011 and that an independent examination is needed.

It is my responsibility to:

- * examine the accounts under section 145 of the 2011 Act;
- * follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- * 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 Association 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 you as trustees concerning 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 requirements:
 - * to keep accounting records (in accordance with section 130 of the 2011 Act); and
 - * to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Acthave not been met; or
- (2) to which, in my opinion, attention should have been drawn in order to enable a proper understanding of the accounts to be reached.



DAVID SOUTHALL
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Macclesfield
Cheshire
SK11 6SR

13th October 2021