

The Presbyterian Historical Society of Ireland

Northern Ireland · Charity number 101056

Details

Known as	PHSI
Status	Received
Registered	2014-12-02
Register	View on the Charity Commission for Northern Ireland register

Contact

Address	Assembly Buildings Fisherwick Place Belfast Bt1 6dw BT1 6DW
Phone	028 9041 7299
Email	phsilibrarian@pcinet.org
Website	www.presbyterianhistoryireland.com

Activities

Purposes: The object of the Society is to advance public education in the history of the Churches of the Presbyterian Order in Ireland by various means, including the collection and preservation of historic materials of such Churches.

What the charity does: The advancement of education

How the charity works: Advice/advocacy/information,Cultural,Education/training,Heritage/historical

Who the charity helps: General public

Finances

Period end	Income	Expenditure	Assets	Employees
2025-12-31	£35,844	£35,250	£0	1

Trustees

Name	Role	Appointed
Dr Colin Walker		
Dr David Dunlop		
Dr Matthew Houston		
Dr Trevor Mccavery		
Dr William Roulston		
Miss Audrey Hodge		
Mr Derek W Alexander		
Mr John Erskine		
Mr Leslie Mckeague		
Mr Stephen Johnston		
Mrs Alison Mccaughan		
Prof Norma Dawson		
Rev Dr Colin McClure		
Rev Dr Craig Wilson		
Rev Dr Samuel Bostock		
Rev Ivor Smith		
Rev Jim Stothers		
Rev John Glasgow Faris		
Rev Prof William Addley		
Rev Tony Davidson		
Rev. Derek Weir		
Rev. Dr. David Steers		
Rev. Dr. John Nelson		
Rev. Dr. Robert Tosh		
Rev. Jack Lamb		
Rev. Prof. Robert Mccollum		
Very Rev Dr Donald Patton		


Name	Role	Appointed
Very Rev Dr Godfrey Brown		
Very Rev Dr John Dunlop		
Very Rev Dr John Lockington		
Very Rev. Dr. Michael Barry		

The Presbyterian Historical Society of Ireland

Northern Ireland - Charity number 101056

Accounts



Charity Name			Charity No.	
Presbyterian Historical Society of Ireland			101056	
Receipts and payments accounts				
For the period from	01/01/2025	To	31/12/2025	

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Restricted funds	Endowment funds	Total funds	Last year
		Robert Allen Memorial	Ulster Scots & DFC			
	£	£	£	£	2025 £	2024 £
Breakdown of Restricted Funds						
A1 Receipts						
Grants	26,500			-	26,500	23,000
Membership Fees	2,492			-	2,492	2,682
Book Sales	1,727			-	1,727	1,278
Donations	1,310			-	1,310	2,510
Collections	548			-	548	309
Field Trip	735			-	735	1,340
Investment Income	1,953	424		-	2,377	2,307
Bank Interest	106			-	106	116
Ulster Scots & DFC Grants				-	-	-
Other Income	49			-	49	49
A1 Sub total (Gross income for the Annual Return)	35,420	424	-	-	35,844	33,590
A2 Asset and investment sales (see tables 1 and 2 in section 7 of the guidance).						
	-	-	-	-	-	-
A2 Sub total	-	-	-	-	-	-
Total receipts	35,420	424	-	-	35,844	33,590
A3 Payments						
Rent and Service Charges	15,525			-	15,525	13,037
Wages and Salaries	14,362			-	14,362	12,863
Insurance	-			-	-	1,243
Field Trip	765			-	765	1,410
Printing and Stationery	2,562			-	2,562	1,676
Postage and Office Supplies	1,059			-	1,059	830
IT Related Expenditure	164			-	164	2,154
Other Expenditure	813			-	813	252
Robert Allen Lecture				-	-	125
Ulster Scots items				-	-	-
A3 Sub total	35,250	-	-	-	35,250	33,590
A4 Asset and investment purchases (see tables 1 and 2 in section 7 of the guidance)						
	-	-	-	-	-	-
A4 Sub total	-	-	-	-	-	-
Total payments	35,250	-	-	-	35,250	33,590
Net of receipts/(payments)	170	424	-	-	594	-
A5 Transfers between funds	-	-	-	-	-	-
A6 Cash funds last year end	44,944	3,262	-	-	48,206	48,206
Cash funds this year end	45,114	3,686	-	-	48,800	48,206

Period end date: 31/12/2025

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
		£	£	£	£	£
B1 Cash funds	Charity Current Account	45,114	3,686		48,800	48,206
					-	-
	Total cash funds	45,114	3,686	-	48,800	48,206

(agree balances with receipts and payments account(s))

Categories	Details	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
		£	£	£	£	£
B2 Other monetary assets			-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
	Total				-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)	Last year
B3 Investment assets	6992 Shares in PCI General Investment Fund (Valuation at 31 Dec 2025 of £13.357 per share). Held in trust with dividends being available for use by the Society.		-	93,392	97,587
			-	-	-
			-	-	-
	Total		-	93,392	97,587

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)	Last year
B4 Assets retained for the charity's own use			-	-	-
			-	-	-
			-	-	-
			-	-	-
			-	-	-
	Total			-	-

Categories	Details	Fund to which liability relates	When due (optional)	Amount due (optional)	Last year
B5 Liabilities				-	-
				-	-
				-	-
	Total			-	-

Signed by one or two trustees on behalf of all the trustees


Signature	Print Name	Date of approval
<i>Tony Davidson</i>	Rev Tony Davidson	18/03/26
<i>Stephen Johnston</i>	Stephen Johnston	18/03/26

The Presbyterian Historical Society of Ireland

Northern Ireland - Charity number 101056

Accounts



Charity Name Presbyterian Historical Society of Ireland			Charity No. 101056		
Receipts and payments accounts					
For the period from	01/01/2024	To	31/12/2024		

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Restricted funds	Endowment funds	Total funds	Last year
Breakdown of Restricted Funds		Robert Allen Memorial	Ulster Scots & DFC			
	£	£	£	£	2024 £	2023 £
A1 Receipts						
Grants	23,000			-	23,000	23,000
Membership Fees	2,682			-	2,682	3,341
Book Sales	1,278			-	1,278	1,622
Donations	2,510			-	2,510	947
Collections	309			-	309	670
Field Trip	1,340			-	1,340	1,640
Investment Income	1,896	412		-	2,307	1,818
Bank Interest	116			-	116	118
Ulster Scots & DFC Grants				-	-	-
Other Income	49			-	49	5,458
A1 Sub total (Gross income for the Annual Return)	33,179	412	-	-	33,590	38,614
A2 Asset and investment sales <i>(see tables 1 and 2 in section 7 of the guidance).</i>						
	-	-	-	-	-	-
A2 Sub total	-	-	-	-	-	-
Total receipts	33,179	412	-	-	33,590	38,614
A3 Payments					2024 £	2023 £
Rent and Service Charges	13,037			-	13,037	15,858
Wages and Salaries	12,863			-	12,863	11,799
Insurance	1,243			-	1,243	1,956
Field Trip	1,410			-	1,410	1,596
Printing and Stationery	1,676			-	1,676	2,256
Postage and Office Supplies	830			-	830	749
IT Related Expenditure	2,154			-	2,154	2,588
Other Expenditure	252			-	252	3,770
Robert Allen Lecture		125		-	125	80
Ulster Scots items				-	-	11,970
A3 Sub total	33,465	125	-	-	33,590	52,622
A4 Asset and investment purchases <i>(see tables 1 and 2 in section 7 of the guidance)</i>						
	-	-	-	-	-	-
A4 Sub total	-	-	-	-	-	-
Total payments	33,465	125	-	-	33,590	52,622
Net of receipts/(payments)	287	287	-	-	0	14,008
A5 Transfers between funds	-	-	-	-	-	-
A6 Cash funds last year end	44,944	3,262			48,206	62,214
Cash funds this year end	44,657	3,549	-	-	48,206	48,206

Period end date: 31/12/2024

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds £	Restricted funds £	Endowment funds £	Total funds £	Last year £
B1 Cash funds	Charity Current Account	44,657	3,549		48,206	48,206
					-	-
	Total cash funds	44,657	3,549	-	48,206	48,206

(agree balances with receipts and payments account(s))

Categories	Details	Unrestricted funds £	Restricted funds £	Endowment funds £	Total funds £	Last year £
B2 Other monetary assets			-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
		-	-	-	-	-
				Total	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)	Last year
B3 Investment assets	6992 Shares in PCI General Investment Fund (Valuation at 31 Dec 2024 of £13.957 per share). Held in trust with dividends being available for use by the Society.		-	97,587	93,182
			-	-	-
			-	-	-
			-	-	-
		Total	-	97,587	93,182

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)	Last year
B4 Assets retained for the charity's own use			-	-	-
			-	-	-
			-	-	-
			-	-	-
			-	-	-
			Total	-	-

Categories	Details	Fund to which liability relates	When due (optional)	Amount due (optional)	Last year
B5 Liabilities				-	-
				-	-
				-	-
				-	-
		Total		-	-

Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval
	<i>Michael Barry</i>	Very Rev Dr Michael Barry	19/03/25
	<i>Stephen Johnston</i>	Stephen Johnston	19/03/25

The Presbyterian Historical Society of Ireland

Northern Ireland - Charity number 101056

Annual report

PRESBYTERIAN HISTORICAL SOCIETY OF IRELAND

Trustees' Annual Report for the Financial Year 1 Jan — 31 Dec 2024

Submission to the Charity Commission for Northern Ireland

Charity Name: The Presbyterian Historical Society of Ireland (PHSI).

Charity Number: 101056

Address: Assembly Buildings, Fisherwick Place, Belfast BT1 6DW.

Names of Trustees: Rev Prof W Addley; Mr DW Alexander; Very Rev Dr M Barry (Chairman); Very Rev Dr G Brown; Very Rev Dr J Dunlop; Mr J Erskine; Rev T Gribben; Mr S Johnston; Rev J Lamb; Very Rev Dr J Lockington; Mrs A McCaughan; Dr T McCavery; Rev Prof R McCollum; Mr L McKeague; Mr J Moffett; Rev S Moore; Rev Dr J Nelson; Very Rev Dr D Patton; Dr W Roulston; Rev I Smith; Rev Dr D Steers; Miss M Stewart; Mrs J Taylor; Rev Dr R Tosh; Dr C Walker; Rev D Weir; Rev S Woodburn.

Governance of PHSI:

PHSI is governed by its Constitution which outlines how the Society is organised and managed.

Structure and Management of PHSI:

PHSI is managed by a Council whose members are either elected annually at the Annual General Meeting, usually in March or are appointed by the General Council of the Presbyterian Church in Ireland. The Society's Council in 2024 had a membership of 27, including ex officio, nominated and elected members, with 5 members constituting a quorum for the transaction of business. The office-bearers of PHSI include two Secretaries, and a Treasurer, who with the Chairman and the other members of Council, run the Society. The Council therefore has the responsibility for planning and carrying out measures in support of the Society's objectives. Day-to-day administration is carried out by a part-time Assistant Secretary/Librarian and Archivist. Minutes are kept of all meetings and full

accounting records are kept by the Treasurer, indicating the financial position of PHSI at any time during the financial year.

Purpose of PHSI:

The purpose of the PHSI is to advance public education in the history of the Churches of the Presbyterian order in Ireland by various means, including the collection and preservation of historic materials and records of such churches. The founding churches were the Presbyterian Church in Ireland, the Non-Subscribing Presbyterian Church of Ireland and the Reformed Presbyterian Church of Ireland.

Activities:

The main activities of PHSI include: the delivery of a programme of lectures; the production of publications; assisting researchers in person, by telephone and by e-mail; fulfilling requests for publications; adding content to the PHSI website; and accessioning and cataloguing printed and archival material and artefacts into the Society's collections.

Achievements:

The Society was able to provide a range of lectures during 2024 with these lectures covering a range of subjects of Presbyterian historical interest. Talks were given regularly to members as well as to church groups and local and family history societies. In addition to the regular lectures some informal events were organised and a field trip to the Mid and East Down area took place in June 2024. A number of publications were produced and well received by members of the society and other interested parties alike.

Many visitors from abroad, local researchers and PHSI members continued to make good use of the library and archive. While visitors are encouraged to become members, the Society's facilities and research assistance is equally available to non-members. Visits by researchers to the library and archive were facilitated during 2024 as well as answering emails and telephone calls relating to the history of Presbyterianism and Presbyterian churches, the careers of Presbyterian ministers and family history.

The PHSI website, one of the principal means of communicating with the general public, has again proved popular during 2024. The number of visits to the website during the year continued to increase (compared to 2023) while the number of Associate members who joined on-line in 2024 remained similar to that in the previous year. The website therefore remains an important means of attracting people to take an interest in the history of Presbyterianism and in helping people to trace their Presbyterian ancestors. New pages were also added to the website, especially with additional articles in the history section.

The Society continues to make good use of social media and by the end of 2024 there were about 1,300 *Facebook* followers. Information can therefore be disseminated widely which helps promote a greater understanding of Presbyterianism by the public.

The work of collecting and preserving archives, printed material, photographs, artefacts and other objects of historical interest for the Churches of the Presbyterian order continued throughout 2024. PHSI is grateful to those who have entrusted historical material to the Society's care.

Volunteering is an important aspect of the work of the Society which enables projects to be carried out which would not otherwise be possible. The Society's very committed group of volunteers continue to work effectively and we wish to record our thanks for all their work on our behalf.

Public Benefit:

Beneficiaries from the Society's work include not only PHSI members but the general public, both local and overseas. Visitors normally have free access to the facilities and benefit from the Society's resources, website and staff expertise and research knowledge. This includes research of family and local history, the history of individual churches, academic research and journalistic research. The beneficiaries from the activities of PHSI, mainly through on-line means this year, have gained improved knowledge and understanding of the history of Presbyterianism in Ireland and of individual congregations. They have discovered more of their Presbyterian roots and gained a greater awareness of the impact of Presbyterianism on society. These all help to fulfil the purpose of PHSI as set out

above. This benefit is apparent from the feedback from the general public and from the academic community who visit the PHSI library and archive to carry out relevant research, visit its website, attend lectures and outings, and purchase publications as well as from the number of on-line visits. These avenues ensure that the activities of PHSI advance public education in Presbyterian historical matters. The Trustees of the PHSI have complied with their duty to have regard to the Charity Commission's 'Public Benefit Requirement' statutory guidance. There is no private benefit arising from the purpose of PHSI.

Financial Review:

An annual grant from the Presbyterian Church in Ireland (£23,000 in 2024) represents the main source of funding for PHSI. Donations are also received from individual Presbyterian Churches, other churches of the Presbyterian order and from individuals. Membership income together with interest from bequests and sales of books and pamphlets make up the remainder. The main areas of expenditure include the cost of leasing and servicing the Society's premises, the salary of a part-time assistant secretary/librarian and archivist, the cost of printing and stationery, insurance and IT related expenditure. Overall, most of the expenditure items were of the same order as in the previous year with income also following the expected annual pattern. As a result, the Society's income matched its expenditure for the 2024 financial year.

PHSI Account:

The PHSI account operated in credit for the whole of the financial year 2024, with the end of year balance being £48,206.

Report Authorisation:

This report was approved for submission by the Treasurer on 21 March 2025.

Stephen Johnston
Treasurer
21 March 2025

The Presbyterian Historical Society of Ireland

Northern Ireland - Charity number 101056

Annual return

Independent Examiner's report to the Trustees of the Presbyterian Historical Society of Ireland

I report on the accounts of the Presbyterian Historical Society of Ireland for the year ended 31 December 2024 as set out in pages 1 and 2.

Respective responsibilities of charity trustees and examiner

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the Charities Act (Northern Ireland) 2008.

It is my responsibility to:

- examine the accounts under section 65 of the Charities Act
- follow procedures laid down in the Directions given by the Commission under section 65 (9)(b) of the Charities Act
- state whether particular matters have come to my attention.

Basis of independent examiner's report

I have examined your charity accounts as required under section 65 of the Charities Act and my examination was conducted in accordance with the general Directions given by the Charity Commission for Northern Ireland under section 65 (9) (b) of the Charities Act.

My examination included a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also included consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as charity trustees concerning any such matters.

My role is to state whether any material matters have come to my attention giving me cause to believe:

1. That accounting records were not kept in accordance with section 63 of the Charities Act
2. That the accounts do not accord with those records
3. That the accounts do not comply with the requirements of the Charities Act
4. That there is further information needed for a proper understanding of the accounts to be reached.

Independent Examiner's Statement

I have completed my examination and have no concerns in respect of the matters listed (1) to (4) above and, in connection with following Directions of the Charities Commission of Northern Ireland, I have found no matters that require drawing to your attention.

John McCleary FCA
McCleary & Co Ltd
Garvey Studios
14 Longstone Street
Lisburn
Co. Antrim
BT28 1TP


6th March 2025

The Presbyterian Historical Society of Ireland

Northern Ireland - Charity number 101056

Accounts



Charity Name			Charity No.		
Presbyterian Historical Society of Ireland			101056		
					
Receipts and payments accounts					
For the period from	01/01/2023		To	31/12/2023	

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Restricted funds	Endowment funds	Total funds	Last year
Breakdown of Restricted Funds		Robert Allen Memorial	Ulster Scots & DFC			
	£	£	£	£	2023 £	2022 £
A1 Receipts						
Grants	23,000			-	23,000	23,000
Membership Fees	3,341			-	3,341	1,380
Book Sales	1,622			-	1,622	898
Donations	947			-	947	5,572
Collections	670			-	670	438
Field Trip	1,640			-	1,640	-
Investment Income	1,494	324		-	1,818	1,888
Bank Interest	118			-	118	62
Ulster Scots & DFC Grants				-	-	39,317
Other Income	5,458			-	5,458	464
A1 Sub total (Gross income for the Annual Return)	38,289	324	-	-	38,613	73,019
A2 Asset and investment sales (see tables 1 and 2 in section 7 of the guidance).						
	-	-	-	-	-	-
A2 Sub total	-	-	-	-	-	-
Total receipts	38,289	324	-	-	38,613	73,019
A3 Payments					2023 £	2022 £
Rent and Service Charges	15,858			-	15,858	9,743
Wages and Salaries	11,799			-	11,799	9,766
Insurance	1,956			-	1,956	168
Field Trip	1,596			-	1,596	-
Printing and Stationery	2,256			-	2,256	795
Postage and Office Supplies	749			-	749	764
IT Related Expenditure	2,588			-	2,588	1,577
Other Expenditure	3,770			-	3,770	3,728
Robert Allen Lecture		80		-	80	120
Ulster Scots items			11,970	-	11,970	27,347
A3 Sub total	40,571	80	11,970	-	52,621	54,008
A4 Asset and investment purchases (see tables 1 and 2 in section 7 of the guidance)						
	-	-	-	-	-	-
A4 Sub total	-	-	-	-	-	-
Total payments	40,571	80	11,970	-	52,621	54,008
Net of receipts/(payments)	- 2,282	244	- 11,970	-	- 14,008	19,011
A5 Transfers between funds	-	-	-	-	-	-
A6 Cash funds last year end	47,226	3,018	11,970	-	62,214	43,203
Cash funds this year end	44,944	3,262	-	-	48,206	62,214

The Presbyterian Historical Society of Ireland

Northern Ireland - Charity number 101056

Annual report

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Many visitors from abroad, local researchers and PHSI members continued to make good use of the library and archive. While visitors are encouraged to become members, the Society's facilities and research assistance is equally available to non-members. Visits by researchers to the library and archive were facilitated during 2023 as well as answering emails and telephone calls relating to the history of Presbyterianism and Presbyterian churches, the careers of Presbyterian ministers and family history.

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The Society continues to make good use of social media and by the end of 2023 there were about 1,300 *Facebook* followers. Information can therefore be disseminated widely which helps promote a greater understanding of Presbyterianism by the public.

The work of collecting and preserving archives, printed material, photographs, artefacts and other objects of historical interest for the Churches of the Presbyterian order continued throughout 2023. PHSI is grateful to those who have entrusted historical material to the Society's care.

Volunteering is an important aspect of the work of the Society which enables projects to be carried out which would not otherwise be possible. The Society's very committed group of volunteers continue to work effectively and we wish to record our thanks for all their work on our behalf..

Public Benefit:

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above. This benefit is apparent from the feedback from the general public and from the academic community who visit the PHSI library and archive to carry out relevant research, visit its website, attend lectures and outings, and purchase publications as well as from the number of on-line visits. These avenues ensure that the activities of PHSI advance public education in Presbyterian historical matters. The Trustees of the PHSI have complied with their duty to have regard to the Charity Commission's 'Public Benefit Requirement' statutory guidance. There is no private benefit arising from the purpose of PHSI.

Financial Review:

An annual grant from the Presbyterian Church in Ireland (£23,000 in 2023) represents the main source of funding for PHSI. Donations are also received from individual Presbyterian Churches, other churches of the Presbyterian order and from individuals. Membership income together with interest from bequests and sales of books and pamphlets make up the remainder. The main areas of expenditure include the cost of leasing and servicing the Society's premises, the salary of a part-time assistant secretary/librarian and archivist, the cost of printing and stationery, insurance and IT related expenditure. Overall, most of the expenditure items were of the same order as in the previous year, however the timing of payment of some items around year end resulted in a small operating excess of expenditure over income of £2,038 for the full year 2023.

PHSI Account:

The PHSI account operated in credit for the whole of the financial year 2023, with the end of year balance being £48,206.

Report Authorisation:

This report was approved for submission by the Treasurer on 21 March 2024.

Stephen Johnston
Treasurer
21 March 2024

The Presbyterian Historical Society of Ireland

Northern Ireland - Charity number 101056

Annual return

Independent Examiner's report to the Trustees of the Presbyterian Historical Society of Ireland

I report on the accounts of the Presbyterian Historical Society of Ireland for the year ended 31 December 2023 as set out in pages 1 and 2.

Respective responsibilities of charity trustees and examiner

As the charity's trustees you are responsible for the preparation of the accounts in accordance with the Charities Act (Northern Ireland) 2008.

It is my responsibility to:

- examine the accounts under section 65 of the Charities Act
- follow procedures laid down in the Directions given by the Commission under section 65 (9)(b) of the Charities Act
- state whether particular matters have come to my attention.

Basis of independent examiner's report

I have examined your charity accounts as required under section 65 of the Charities Act and my examination was carried out in accordance with the general Directions given by the Charity Commission for Northern Ireland under section 65 (9) (b) of the Charities Act.

My examination included a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also included consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as charity trustees concerning any such matters.

My role is to state whether any material matters have come to my attention giving me cause to believe:

1. That accounting records were not kept in accordance with section 63 of the Charities Act
2. That the accounts do not accord with those records
3. That the accounts do not comply with the requirements of the Charities Act
4. That there is further information needed for a proper understanding of the accounts to be reached.

Independent Examiner's Statement

I have completed my examination and have no concerns in respect of the matters listed (1) to (4) above and, in connection with following Directions of the Charities Commission of Northern Ireland, I have found no matters that require drawing to your attention.

John McCleary FCA
McCleary & Co Ltd
Garvey Studios
14 Longstone Street
Lisburn
Co. Antrim
BT28 1TP

5th March 2024