

**Report of the Trustees and  
Financial Statements for the Year Ended 31 December 2016  
for  
Oral History Society**

Prestons & Jacksons Partnership LLP  
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Essex  
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## Oral History Society

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## **Oral History Society**

### **Chair's Report for the Year Ended 31 December 2016**

This will be my final AGM report as Chair of the Oral History Society. As I have explored in earlier annual reports, the Society has changed a great deal since 2004 and it has been pleasing to be part of these changes. However, we are now entering a new phase and the Society will benefit from new leadership in continuing to seek to represent a burgeoning oral history community.

The growing number and activity of Special Interest Groups, represents one way that Trustees are responding on behalf of the Society's membership. At the same time, our status as a learned society has risen and we have participated in consultations and discussions that will help shape the future of research assessment and funding in Higher Education. We have also supported the British Library's Sound Archive's successful multi-million-pound bid to the Heritage Lottery Fund for the 'Unlocking Our Sound Heritage' programme. The programme, previously known as 'Save Our Sounds', will include the digitisation of at risk oral history collections across Britain and is a tribute to the hard work of our colleagues at the Sound Archive.

All this activity suggests that oral history is maturing into a discipline, even if it runs contrary to a tradition amongst oral historians to resist thinking of oral history as such. In the past, some members preferred oral history to concentrate on being a cross-disciplinary method, while others fretted that becoming a discipline would mean establishing professional norms that would discourage wide and democratic participation. However, oral history in the past fourteen years has, I would argue, managed to adopt disciplinary standards, while being open to new ideas and new members. We may sometimes feel that there are strains between academic and community activities within oral history, but it has been a creative tension that has been creative, allowing for the circulation of diverse ideas.

There are four conditions that oral history meets that suggests that oral history will develop further in becoming a discipline. The first of these is the creation of substantial collections of publicly available primary sources; 'Unlocking Our Sound Heritage' will consolidate this further. A second condition is a body of secondary outputs that presents findings through analyses of these sources. We can see evidence of this in a range of public history and research outputs including rising numbers of conferences and workshops. Third, the oral history community experiences knowledgeable debate, not least through the Oral History journal, that is inspiring further refinement of collection and interpretation, and this has even led to radical changes in thinking about the theories and practices of oral history. Finally, there are the beginnings of an agreed overview that details the intellectual landscape through which oral history practitioners travel. Regardless of how contentious or otherwise this mapping might be, there is at least the beginnings of the necessary means by which oral history can be further defined.

It is therefore my conviction that oral history is an emergent discipline. As such the tasks ahead include ensuring we broaden the material base to maintain our activities. At the same time, we should aim to maintain our openness to ideas beyond our current thinking and to new practitioners joining our community. I hope to be able to play a part in that, but not as Chair of the Society. That task will be for someone else.

In wishing my successor well, I know that she or he will enjoy the support of the Trustees and Officers. It has been a pleasure serving the Society, because of that backing. The Society's success in so many areas, from training to advocacy to dissemination and advocacy, relies a great deal not only on the Committee of Trustees, but also the Training Group and Regional Network. Thank you all.

Finally, I would like to thank the Society's members whose financial support and engagement with oral history has made my time as Chair a pleasure.

**Graham Smith**

## **Oral History Society**

### **Treasurer's Report for the Year Ended 31 December 2016**

The Society had a strong year financially with reserves increasing by over £10,000. Income in 2016 was reduced due to no receipts for Donations and Legacies and also due to the fact that in 2016 Roehampton University administered the annual conference on behalf of the Society which only shared in part of the risk and part of the resulting surplus. This was also obviously reflected in lower costs for the year. The net outcome was little changed on the previous year with a surplus of just over £10,000 which left a strong balance sheet position with cash balances of over £96,000 at year end.

**Nick Chalmers**

## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2016**

The trustees present their report with the financial statements of the charity for the year ended 31 December 2016. The trustees have adopted the provisions of Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015).

## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2016**

#### **ACHIEVEMENT AND PERFORMANCE**

##### **Charitable activities and public benefits provided**

#### **MEMBERSHIP OFFICER'S REPORT**

Despite a slight increase in membership rates, our loyal subscribers remain and membership has now been steady for some considerable time. Adding competitive insurance rates to the list of benefits for members has certainly attracted some and with the present trend in growing numbers of freelance oral historians, it is expected that this trend will continue. Greater understanding of the membership is being sought through various activities of the society as a whole such as details of those joining the SIGs, those attending the Conference or undertaking training and so on. With a more up-to-date and a detailed picture, it will be possible to undertake more directed and focused membership drives. In the meantime, the Supporters' Database is being developed through the various activities of the society such as the SIGs.

**Kate Melvin**

#### **JOURNAL EDITORS' REPORT**

The last twelve months have shown a quiet but steady development for Oral History. Articles, mainly unsolicited, continue to flow in and the editors have published two high quality issues both with strongly international content. Collaborating with annual Oral History Society conference organisers continues to result in interesting submissions which the editors are always pleased to consider.

Katy Wild our journal administrative assistant announced that she had got a new full time job in mid-2016 but was good enough to stay on until her replacement was found. Advertising the vacancy through the Society's website brought a great deal of interest. The interviewing panel read over 70 applications and following an interview with short-listed candidates was unanimous and delighted to offer the post to Liz Ison who attended her first journal editors' meeting in December.

Making contacts through our International Editorial Advisory Group resulted in a special Nordic-Baltic issue, 44/2, appearing in autumn 2016. This was an enjoyable collaboration which has attracted a great deal of attention both in the UK and internationally. The following issue, 45/1, non-themed on this occasion, was strong in content, demonstrating just how wide and varied the reach of oral history can be. Currently, journal editors are working on an issue which focuses on Cuba, following a submission from a group of Cuban oral historians.

The editorial group has responded to various comments and queries raised at meetings of Oral History Society Trustees. These include a request from the Society's Environmental Special Interest Group to consider the implications of printing the journal on recycled paper. With the help of Andy Smith, of Smith+Bell the journal's designers, the group looked at various issues, including increased postal costs, long-term durability of recycled paper and to consider further paper samples in view of various options. This discussion is ongoing.

The editorial group also received a paper from the Oral History Society's Treasurer which helpfully modelled the financial outcomes of moving to open-access, fully or in part. This issue has been discussed at several meetings of the editorial group however concern persists that a move to full open-access, even though this has certain attractions in terms of audience and reputation, would have severe negative financial implications for Society given the possible loss of income from both individual and (especially) institutional subscribers. There was consequent reluctance amongst the editors to take this step. However, plans are in hand to mark the journal's 50th anniversary in 2019 with a special issue and an online offer of 'greatest hits' from Oral History from the last fifty years. The latter would be following the example of the US Oral History Review's anniversary celebration.

Back issues of the journal are popular and are frequently requested and will continue to be available from Webscribe, the journal's subscription agency.

## Oral History Society

### Report of the Trustees for the Year Ended 31 December 2016

#### ACHIEVEMENT AND PERFORMANCE

##### Charitable activities and public benefits provided

The editors continue to work well as a group, sharing responsibilities for the editorial process and benefiting from the wide range of expertise which is represented in the editorial group. We are committed to ensuring that all who submit articles to Oral History receive positive and supportive responses, based on anonymous peer review, whether or not an article is accepted for publication.

We look forward to another year of interesting and stimulating publishing.

**Zibiah Alfred Loakthar, Joanna Bornat, Fiona Cosson, Lindsey Dodd, Jenny Harding, Heather Norris Nicholson, Sean O'Connell, Rob Perks, Anindya Raychaudhuri, Sheena Rolph, Christine Wall**

#### REGIONAL NETWORK COORDINATORS' REPORT

In the last twelve months only one Regional Networker has left the network and we'd like to express our thanks to Jo Palache (South East, Brighton area) for her contribution and wish her the best of luck in her future ventures.

There were three new Networkers appointed in 2016-17:

- Mary Ingoldby for South West, Bristol area;
- Hilary Young for Scotland, Glasgow area
- Emily Hewitt for Wales, Swansea area

The Regional Network held its annual event in October 2015 at The Workstation in Sheffield. It was hosted by our Yorkshire Networkers, Michelle Winslow and Sam Smith.

**Business meeting, Friday 14th October 2016:** Thirteen networkers attended the evening business meeting to exchange news and discuss issues encountered in their role advising and supporting oral history work in their regions. We welcomed new networkers attending the meeting for the first time. Sharing updates on projects and activities around the country, it was interesting to note how the number of inquiries and requests for advice varied significantly across the different regions - with some regions busier than the previous year and vice versa. Once again it was noted that a vast majority of the projects are funded by the Heritage Lottery. This meeting provides networkers the opportunity to share experiences and discuss common issues they encounter in their role as networkers. It also ensures that they are up to date with the developments in the Oral History Society, which this year included the growth of the Special Interest Groups, changes to the website and continuing professional development opportunities.

**Annual Event, Saturday 15th October 2016:** 'Oral History in Museums': Once again, the morning session provided networkers with the opportunity for continuing professional development through presentations from fellow networkers. Martin Bisiker, networker for London, kicked off with a fascinating presentation on 'Creating Oral History Narratives for Museums Using Different Mediums'. Martin's projects with museums make effective use of new technology apps, photos, text and film. He was followed by John Tanner (Yorkshire) who drew on his extensive experience of working with three museums across Yorkshire and using oral history from concept through to delivery. In the afternoon, Padmini Broomfield (South East), Sarah Gudgin (London) and Cynthia Brown (East Midlands) showcased some of diverse and creative ways that oral history has been used in interpretation, displays and audio-visuals at SeaCity Museum Southampton, the Museum of London and at a historic site in Leicester.

**Report of the Trustees  
for the Year Ended 31 December 2016**

**ACHIEVEMENT AND PERFORMANCE**

**Charitable activities and public benefits provided**

At the afternoon session, which was open to local Oral History Society members, Tracey Craggs' lively presentation highlighted her experiences of working in collaboration with Huddersfield University to develop the new Holocaust Learning Centre. Dr Liz Carnegie, Lecturer in Arts and Heritage at Sheffield University, rounded up the day brilliantly with a thought-provoking presentation, 'Curating People? Politics, Pitfalls and the Potential of Oral History in Museums'. Drawing on examples from her own practice as curator at the People's Palace Glasgow, and from work she has collected or critiqued as an academic, she reflected on how museums are 'curating' people and how such interpretations impact on local, individual or communities' sense of ownership of the past, and whether such histories and museum spaces achieve their purpose.

Feedback from networkers yet again indicates that the annual event offers them a rare opportunity to meet and share experiences, discuss issues of mutual interest and learn from each other. Meeting face to face over the course of the weekend fosters closer working relationships, an understanding of other networkers' areas of expertise and an increased sense of informality which encourages people to continue discussions and approach each other for advice and support at other times. Attendance at the annual event continues to be limited to the same regulars and we would very much like to see other networkers at future events. The society can reimburse travel and accommodation for those networkers not supported by an institution. We would like to thank Michelle Winslow and Sam Smith for hosting such a stimulating and well-organised event.

The location of the annual event of 2017 has not yet been finalised.

Ongoing review of administration/goals for the Regional Network:

Recruitment: While we have been successful in recruiting new networkers to replace those who have left or to represent different fields of expertise, we are still seeking a new networker for the Kent area.

The Regional Network annual report 2016: is now [online](#) along with reports from previous years. Each year the report contains a huge variety of projects happening across the country. We encourage all networkers to submit updates from their regions for the upcoming 2017 report.

**Juliana Vandegrift (Regional Network Coordinator) Padmini Broomfield (Deputy Regional Network Coordinator)**

**SCHOOLS REPORT:**

A Schools seminar is being held in late September this year for oral historians working with young people to share experiences and will discuss opportunities and barriers in running projects in schools and in youth groups. Ideas will be shared about teaching and learning, equipment, methods and outputs and the development of a 'resources for schools' pages on the Oral History Society's website. Building upon the themes of the day, a longer-term strategy will be designed exploring how the Oral History Society can broaden the understanding and use of oral history among educators. Further discussions will also be held with the Historical Association in order to detail how the Society can contribute to support teachers in the longer-term.

**Kate Melvin**

**TRAINING REPORT**

**Report of the Trustees  
for the Year Ended 31 December 2016**

**ACHIEVEMENT AND PERFORMANCE**

**Charitable activities and public benefits provided**

The Oral History Society/British Library training team taught 83 courses to 772 attendees in 2016 - a record for the group. These comprised 18 'Introduction to oral history' courses, 56 tailored courses, 2 'Transcript to Script', 2 'Lives in Focus' courses and one 'Developing your oral history skills'. The 'Archival management of oral history collections' - in conjunction with the Archives and Records Association (ARA), has continued to meet a clear need in the archival community - with four courses in 2016. 'Introduction' courses took place in London, Manchester, Worcester and Sheffield. Plans are afoot to run more of the advanced training courses in venues outside of London in 2017 and 2018.

Scores on the feedback forms for introductory and tailored courses remained typically high, with a combined average an approval rating of 4.7 out of 5. Doctoral research students and community history projects were key constituent groups for the courses, the latter generally requesting tailored training. Attendees came from across the UK - with a majority in London and the South East. Continuing the pattern from previous years, there was little attendance from areas which had other strong training providers - such as Scotland, North East and East Midlands. Since the 'concessionary rate' for courses had been dropped in early 2016 there had been a marked increase bookings at the Oral History Society's member rate - which was pleasing.

In 2016, the Trainers' Liaison Group identified a gap in training provision in Northern Ireland. After an open recruitment process in early 2017 we welcome Dr Anna Bryson of Queen's University Belfast to the team.

At the 2017 Trainers' Liaison meeting the group agreed to explore possible new courses around digital editing and project planning and design. Pilot courses are planned for later in 2017. The group also discussed in detail how to better promote our work on social media, and explain the discounts available on all courses for Society members. There was also discussion of how tailored training could be better 'packaged' for community funded projects (often through HLF), to ensure that there was adequate funding for follow up courses and that the trainer was adequately reimbursed for further work with a group. Following a helpful lunchtime discussion with Andrew Pearson (British Library Technical Services audio engineer) the group will soon be updating our technical advice, particularly around microphone positioning and to further explain the perils of recording on smartphones.

The team would like to thank Eleanor Lowe for administering the training programme with cheer and efficiency. We also wish Eleanor well as she leaves her post as training administrator to focus on her doctoral studies and an important new role as she will become a mum in the autumn.

**Mary Stewart**

**HIGHER EDUCATION REPORT**

The Oral History Society's Higher Education (HE) Group was set up in response to a perceived lack of institutional support for the increasing use of oral history across a range of disciplines in teaching and research in Higher Education.

In a recent working paper (March 2016), the group prioritised activities designed to: a) meet the educational needs of postgraduates; b) ensure that oral history is taught to the highest standard and in a sustainable way; and c) enhance the status of oral history in HEIs. As part of this focus, a dedicated HE strand was included in the 2016 Oral History Society conference for the first time, focusing specifically on teaching oral history in HE. We also held a one-day symposium on Teaching Oral History in Higher Education in December 2016, supported by the Institute for Historical Research.

The symposium was well attended by academics from a variety of institutions and academic backgrounds (history, history of science, sociology, drama, media and communications and so on). The day focused on discussing the needs of students and teachers at undergraduate, postgraduate and PhD levels and was geared towards starting to outline frameworks for good practice/subject benchmarks in teaching at all three levels.

## Oral History Society

### Report of the Trustees for the Year Ended 31 December 2016

#### ACHIEVEMENT AND PERFORMANCE

##### Charitable activities and public benefits provided

Following on from this, and issues previously raised by students at Oral History Society conferences, we designed a survey questionnaire for collecting information about doctoral students' experience of supervision. This was piloted at the Oral History Spring School in May 2017 and will be available via the Society's website. We plan to circulate links to the questionnaire via our various networks. We anticipate that survey responses will be used to inform the development of materials to support PhD supervisors as well as future workshops for students and lecturers. We are also developing a list of oral historians with experience of supervising and examining PhDs using oral history.

This year, the HE Group collaborated with the Institute for Historical Research in presenting a sixth Oral History Spring School (May 2017) and sixth series of Thursday evening seminars. The Spring School was highly successful: with all places filled, lively participation and very positive feedback. The programme was also organised and taught by Joanna Bornat, Jenny Harding, Graham Smith, Paul Thompson and Shelley Trower. The seminar series, organised by Anne Gulland and Joel Morley, included an interesting range of papers and was generally well attended. We are already thinking ahead to developing programmes for a 2018 Spring School and seminar series.

We also coordinated the Society's response to the Higher Education Funding Council for England's Research Excellence Framework 2020/1 consultation and we were represented at the British Academy's earlier event with Lord Sterne and representatives of the Higher Education Statistics Agency (HESA) who play a key role in operationalising research assessments. We, along with fellow members in the Arts and Humanities Alliance, pressed the case for publication portability for early career researchers. We also raised a number of other concerns including the problems of using HESA cost centres as units of assessment without offering clearer guidelines for cross-disciplinary activities and the ways in which emergent disciplines and multi-disciplinary groupings could be disadvantaged.

**The HE Group: Angela Bartie, Joanna Bornat, Fiona Cosson, Jenny Harding, Graham Smith, Shelley Trower**

#### WEBSITE REPORT

In the past year, the Society's website has continued to evolve, this update gives a flavour of work that has been undertaken.

The size of the website and its traffic have increased in recent years. In order to cope with this growth, we embarked on the significant and lengthy task of moving website hosting and associated Society email addresses to our maintenance and development company, Evoluted. This work went smoothly and is now complete.

Changes to website pages include simplifying and refining the online booking system for training courses, after a bedding in period. 2017 conference pages and booking information have been added, the Society's four Special Interest Groups (SIGs) continue to develop their pages and work has been carried out on the Events Calendar to provide a more user-friendly list format.

Current and future work includes reviewing and refreshing the Journal pages, working with the SIGs to develop more content and incorporating more audio and video on the website. Work for the latter is underway, we are identifying material and exploring ways in which the Oral History Society can create new audio visual materials.

## Oral History Society

### Report of the Trustees for the Year Ended 31 December 2016

#### ACHIEVEMENT AND PERFORMANCE

##### Charitable activities and public benefits provided

During the period, January-March 2017, 7,256 users visited the Oral History Society website, 36% of these were new visitors. The site had 29,848 page views and the average session duration was 2 ½ minutes. In order of popularity the most frequently visited pages were: Vacancies, Conferences, Training, Legal and Ethical advice and Volunteering.

Society members are encouraged to contribute news and event information to the website, as well as thoughts and ideas about content. Please contact me: [m.winslow@sheffield.ac.uk](mailto:m.winslow@sheffield.ac.uk)

**Michelle Winslow**

#### PUBLICITY

I've been in post for six years and have been focusing on improving the Oral History Society's social media presence by:

- Posting on Twitter where we now have around 4400 followers (increase of 700 on last year)
- Updating the Facebook page
- Helping to update the Oral History Society's website

This year I have been mainly focusing on our direct communications to members via the newsletter. The newsletter used to be an attachment to an email but is now done via MailChimp, which is much faster and enables me to link direct to webpages. I can also monitor how many people click onto the newsletter and which links are the most clicked on.

The newsletter goes out to around 1700 different email addresses (it's difficult to say whether this is individual subscribers as some people have more than one email address) and it's the best way to speak to members.

I'm sending out newsletters more frequently (used to be once every two to three months) but they are much shorter than before. I'm also trying to make them more attractive, using photographs and images, although I need to balance this with ensuring that newsletters are not too long.

I have been trying to liaise with the special interest groups to encourage them to send me any events/information they would like me to publicise.

As a co-convenor of the oral history seminar series at the Institute of Historical Research I also publicise that, sending out information to various newsletters and lists to ensure that we reach as many people as possible.

I am always willing to advertise members' news so please email me: [annecgulland@yahoo.co.uk](mailto:annecgulland@yahoo.co.uk) if you have something you would like to publicise. I can't guarantee that I will include everything!

#### SPECIAL INTEREST GROUPS

##### ENVIRONMENT AND CLIMATE CHANGE SIG

The Special Interest Group on Environment and Climate Change (ECC- SIG) is growing steadily.

The group held its first meeting at the British Library on 17th November 2016. Chaired by Allan Shepherd, whose proposal initiated the ECC-SIG, the meeting brought together 9 members, including one via a Skype link from Alaska.

## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2016**

#### **ACHIEVEMENT AND PERFORMANCE**

##### **Charitable activities and public benefits provided**

The meeting was an opportunity for members to share information about their own projects and research interests as well as discuss the way forward for the ECC-SIG. The current membership stands at 17, and includes members based in Alaska, Australia and Taiwan, and represents academics, researchers and freelancers. Members are involved in projects that use archival and new oral histories to research issues relating to rivers, waterways, urban environments and weather patterns, document the impact of climate change on affected communities and develop educational resources.

Other discussions revolved around what the group wanted from the SIG and how this could be achieved. There is a great enthusiasm to work together to share information, collaborate on future projects and publications, and help raise awareness of the issues to the wider public. Everyone acknowledged the importance of oral history in recording stories of those affected and "using local memories as a way of illustrating the unprecedented nature and emotional impact of flooding" and other climate change events.

Suggestions for group activities included contributing to a joint article for the Oral History journal, collating information on oral history archives containing material relating to the topic, collaborating on a joint project and developing links with other organisations involved in research into environment and climate change.

Since the meeting, the group has continued to exchange information, initiate contacts in other groups and shared research resources. A proposal for an ECC-SIG panel at the next Oral History Society conference has been accepted, with papers from Rebecca Pearce, Diana Salazar, and Allan Shepherd. Rebecca Pearce will also be talking at one of the Society's joint seminars with the Institute of Historical Research in the next academic year, and we plan to arrange the next ECC-SIG meeting earlier that day.

There has also been some talk about the possibility of a future conference on the topic of environment / climate change / place / the future. It seems a serious omission, to think so little as a Society about what on earth we are saving our sounds for.

**Shelley Trower and Padmini Broomfield [Trustee Liaisons for ECC-SIG]**

#### **LGBTQ**

The Oral History Society Lesbian, Gay, Bisexual, Transgender and Queer Special Interest Group brings together members of the Oral History Society who are working with LGBTQ participants or communities or are interested in the issues and practice involved. Our aim is to gather and share knowledge and explore a heritage which has historically been hidden. Since the group's formation, at the Oral History Society 2016 conference at University of Roehampton, we have had several meetings and participated in the 2016 London Metropolitan Archives LGBTQ History and Archives conference. The group will host a panel session at this year's Oral History Society Conference in Leeds presenting papers which consider issues of faith and belief that are relevant to LGBTQ communities. Next December the Oral History Society LGBTQ SIG will partner with the London Metropolitan Archives to host the LGBTQ History and Archives Conference. The group welcomes enquiries and new members and can be contacted via Clare Summerskill ([claresummerskill@gmail.com](mailto:claresummerskill@gmail.com)) or Alan Butler ([alan.butler@plymouth.ac.uk](mailto:alan.butler@plymouth.ac.uk)).

**Amy Murphy [Trustee Liaison for LGBTQ -SIG]**

## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2016**

#### **FINANCIAL REVIEW**

##### **Financial position**

The board of trustees is satisfied that the charity's assets in each fund are available and adequate to fulfil its obligations in respect of each fund.

The financial statements have been prepared implementing the Charities Act 2011 and the Charities Financial Reporting Standard SORP FRS 102. As stated in the introduction to this report, the trustees consider the financial performance by the charity during the year to have been satisfactory.

The Statement of Financial Activities show incoming resources for the year of £46,373 (prior year £63,687) and outgoing resources of £36,033 (prior year £53,416), making net overall surplus of £10,340, (prior year £10,271).

Free unrestricted reserves amounted to £86,578 (prior year £76,238).

#### **STRUCTURE, GOVERNANCE AND MANAGEMENT**

##### **Governing document**

The charity is controlled by its governing document, a deed of trust, and constitutes an unincorporated charity.

##### **Risk management**

The trustees have a duty to identify and review the risks to the charity charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error.

#### **REFERENCE AND ADMINISTRATIVE DETAILS**

##### **Registered Charity number**

0288805

##### **Principal address**

Dept of History Royal Holloway  
University of London  
Egham Hill  
Egham  
TW20 0EX

**Oral History Society**

**Report of the Trustees  
for the Year Ended 31 December 2016**

**REFERENCE AND ADMINISTRATIVE DETAILS**

**Trustees**

Angela Bartie  
Joanna Bornat  
Padmini Broomfield  
Cynthia Brown  
Verusca Calabria  
Nicholas Chalmers (Treasurer)  
Fiona Cosson  
Alan Dein  
Craig Fees  
Anne Gulland  
Jenny Harding  
Kate Melvin  
Sarah Lowry  
Robert Perks (Secretary)  
Julian Simpson  
Graham Smith (Chair)  
Mary Stewart  
Beth Thomas (Vice Chair)  
Amy Tooth-Murphy  
Shelley Trower  
Juliana Vandegrift  
Robert Wilkinson  
Michelle Winslow  
Hilary Young

**Independent examiner**

Prestons & Jacksons Partnership LLP  
364 - 368 Cranbrook Road  
Ilford  
Essex  
IG2 6HY

Approved by order of the board of trustees on ..... and signed on its behalf by:

.....  
Trustee

## **Independent Examiner's Report to the Trustees of Oral History Society**

I report on the accounts for the year ended 31 December 2016 set out on pages fourteen to twenty.

### **Respective responsibilities of trustees and examiner**

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

It is my responsibility to:

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

### **Basis of the independent examiner's report**

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statements 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 to comply with the accounting requirements of the 2011 Act

have not been met; or

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

Anwer Patel  
BA (Hons), ACA  
Prestons & Jacksons Partnership LLP  
364 - 368 Cranbrook Road  
Ilford  
Essex  
IG2 6HY

Date: .....

## Oral History Society

### Statement of Financial Activities for the Year Ended 31 December 2016

	Notes	31.12.16 Unrestricted fund £	31.12.15 Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>			
Donations and legacies		(29)	12,886
Other trading activities	2	45,929	50,159
Investment income	3	473	642
<b>Total</b>		<b>46,373</b>	<b>63,687</b>
<b>EXPENDITURE ON</b>			
Raising funds		28,776	45,239
<b>Charitable activities</b>			
General		7,257	8,177
<b>Total</b>		<b>36,033</b>	<b>53,416</b>
<b>NET INCOME</b>			
		<b>10,340</b>	<b>10,271</b>
<b>RECONCILIATION OF FUNDS</b>			
<b>Total funds brought forward</b>		<b>76,238</b>	<b>65,967</b>
<b>TOTAL FUNDS CARRIED FORWARD</b>			
		<b>86,578</b>	<b>76,238</b>

#### CONTINUING OPERATIONS

All income and expenditure has arisen from continuing activities.

The notes form part of these financial statements

**Oral History Society**

**Statement of Financial Position  
At 31 December 2016**

	Notes	<b>31.12.16 Unrestricted fund £</b>	31.12.15 Total funds £
<b>CURRENT ASSETS</b>			
Debtors	6	<b>1,867</b>	4,020
Cash at bank		<b>96,925</b>	77,690
		<b>98,792</b>	81,710
<b>CREDITORS</b>			
Amounts falling due within one year	7	<b>(12,214)</b>	(5,472)
		<b>86,578</b>	76,238
<b>NET CURRENT ASSETS</b>		<b>86,578</b>	76,238
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		<b>86,578</b>	76,238
<b>NET ASSETS</b>		<b>86,578</b>	76,238
<b>FUNDS</b>	8		
Unrestricted funds		<b>86,578</b>	76,238
<b>TOTAL FUNDS</b>		<b>86,578</b>	76,238

The notes form part of these financial statements

**Oral History Society**

**Statement of Financial Position - continued**  
**At 31 December 2016**

The financial statements were approved by the Board of Trustees on ..... and were signed on its behalf by:

.....  
Trustee

.....  
Trustee

.....  
Trustee

The notes form part of these financial statements

**Notes to the Financial Statements  
for the Year Ended 31 December 2016**

**1. ACCOUNTING POLICIES**

**Basis of preparing the financial statements**

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) 'Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

**Financial reporting standard 102 - reduced disclosure exemptions**

The charity has taken advantage of the following disclosure exemption in preparing these financial statements, as permitted by FRS 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland':

- the requirements of Section 7 Statement of Cash Flows.

**Income**

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

**Expenditure**

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

**Taxation**

The charity is exempt from tax on its charitable activities.

**Fund accounting**

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

Notes to the Financial Statements - continued  
for the Year Ended 31 December 2016

2. OTHER TRADING ACTIVITIES

	31.12.16	31.12.15
	£	£
Income from Conferences	5,109	11,409
Sale of Back Issues	-	6
Subscription Income	31,196	32,979
Sundries	2,702	2,684
Advertising	326	306
Other Generating Funds	6,596	2,775
	<u>45,929</u>	<u>50,159</u>

3. INVESTMENT INCOME

	31.12.16	31.12.15
	£	£
Deposit account interest	473	642
	<u>473</u>	<u>642</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 December 2016 nor for the year ended 31 December 2015.

Trustees' expenses

	31.12.16	31.12.15
	£	£
Trustees' expenses	3,650	2,303
	<u>3,650</u>	<u>2,303</u>

All expenses incurred in the year were solely for the travelling and training purposes.

5. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £
<b>INCOME AND ENDOWMENTS FROM</b>	
Donations and legacies	12,886
Other trading activities	50,159
Investment income	642
<b>Total</b>	<u>63,687</u>
<b>EXPENDITURE ON</b>	
Raising funds	45,239
<b>Charitable activities</b>	
Carried forward	

Notes to the Financial Statements - continued  
for the Year Ended 31 December 2016

5. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES - continued

	Unrestricted fund £
<b>Charitable activities</b>	
Brought forward	
General	8,177
<b>Total</b>	<u>53,416</u>
<b>NET INCOME</b>	<u>10,271</u>
<b>RECONCILIATION OF FUNDS</b>	
<b>Total funds brought forward</b>	65,967
<b>TOTAL FUNDS CARRIED FORWARD</b>	<u><u>76,238</u></u>

6. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.12.16 £	31.12.15 £
Trade debtors	386	4,020
Other debtors	1,481	-
	<u>1,867</u>	<u>4,020</u>

7. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.12.16 £	31.12.15 £
Other creditors	12,214	5,472
	<u>12,214</u>	<u>5,472</u>

8. MOVEMENT IN FUNDS

	At 1/1/16 £	Net movement in funds £	At 31/12/16 £
<b>Unrestricted funds</b>			
General fund	76,238	10,340	86,578
<b>TOTAL FUNDS</b>	<u>76,238</u>	<u>10,340</u>	<u>86,578</u>

Notes to the Financial Statements - continued  
for the Year Ended 31 December 2016

8. MOVEMENT IN FUNDS - continued

Net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	46,373	(36,033)	10,340
	_____	_____	_____
<b>TOTAL FUNDS</b>	<u>46,373</u>	<u>(36,033)</u>	<u>10,340</u>

9. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 December 2016.

## Oral History Society

### Detailed Statement of Financial Activities for the Year Ended 31 December 2016

	31.12.16 £	31.12.15 £
<b>INCOME AND ENDOWMENTS</b>		
<b>Donations and legacies</b>		
Donations	-	9,766
Gift aid	(29)	3,120
	<u>(29)</u>	<u>12,886</u>
<b>Other trading activities</b>		
Income from Conferences	5,109	11,409
Sale of Back Issues	-	6
Subscription Income	31,196	32,979
Sundries	2,702	2,684
Advertising	326	306
Other Generating Funds	6,596	2,775
	<u>45,929</u>	<u>50,159</u>
<b>Investment income</b>		
Deposit account interest	473	642
	<u>473</u>	<u>642</u>
<b>Total incoming resources</b>	<b>46,373</b>	<b>63,687</b>
<b>EXPENDITURE</b>		
<b>Raising donations and legacies</b>		
Subscription Services	4,443	4,777
Printing and Publishing	17,437	19,420
Conference Costs	2,837	11,727
Regional Works	1,978	1,527
Training	776	1,104
Website	1,305	6,684
	<u>28,776</u>	<u>45,239</u>
<b>Charitable activities</b>		
Stationary and Printing	31	1,819
Bank Charges	472	667
Sundries	522	138
Travel	395	1,204
Administrator	937	930
	<u>2,357</u>	<u>4,758</u>
<b>Support costs</b>		

This page does not form part of the statutory financial statements

## Oral History Society

### Detailed Statement of Financial Activities for the Year Ended 31 December 2016

	31.12.16 £	31.12.15 £
<b>Governance costs</b>		
Trustees' expenses	3,650	2,303
Accountancy and legal fees	1,250	1,116
	<hr/>	<hr/>
	4,900	3,419
	<hr/>	<hr/>
<b>Total resources expended</b>	36,033	53,416
	<hr/>	<hr/>
<b>Net income</b>	10,340	10,271
	<hr/> <hr/>	<hr/> <hr/>

This page does not form part of the statutory financial statements