

**Report of the Trustees and  
Financial Statements for the Year Ended 31 December 2015  
for  
Oral History Society**

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**Oral History Society**

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for the Year Ended 31 December 2015**

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## Oral History Society

### Chairman's Report for the Year Ended 31 December 2015

The Oral History Society's 2013 five-year strategic plan as set out by the Trustees is ambitious. Yet much has already been achieved even if the best laid plans may go awry or at least head in unexpected directions. Above all else we wanted the Society to be 'regarded as the first point of call for the discipline in both academic and community networks'. I believe that we have achieved that core aim, but that we will need to continue to develop to sustain this position.

We still have much to do. We have yet to win the external development funds that the plan identified as necessary resource. Such funding would enable members of the Society to undertake several initiatives that were envisaged as essential to our aims. This includes stepping up our advocacy campaigning for oral history, growing our membership and placing members at the heart of the Society. However, thanks to our financial position, which is healthy, we will be able to invest in a number of initiatives. Under the stewardship of our new Treasurer, Nick Chalmers, we are providing training for Trustees, thereby meeting Charity Commission expectations, offering conference bursaries to members and supporting a range of new initiatives including Special Interest Groups.

Our successes from last year include our revitalised journal. Now with an international editorial collective that combines our most experienced editors with more recently appointed younger colleagues, the journal's future is much more secure. That the journal remains independent of predatory for-profit publishing houses also continues to be a source of pride.

The Society continues to work with other national organisations such as the Institute for Historical Research offering seminars and our annual advanced school, the National Trust (through training) and the Arts and Humanities Alliance <http://artsandhums.org/>, where we collaborate and find common cause with many other learned societies in lobbying government. The Society also continues to make direct representations to funding bodies including the Heritage Lottery Fund. In doing so, we not only ensure that the interests of academic and community oral historians are heard, but that relevant information is disseminated to the Society's membership.

The cumulative and ongoing results of neoliberal austerity remain a pressing concern. Even when archives are saved, as in the case of the North West Sound Archive, questions of public accessibility to recordings can still arise. Continuing funding cuts therefore makes the British Library's Save Our Sounds (SoS) programme even more significant. An initial national audit of UK audio by staff at the Library, with whom the Society has had long association, found that 78 per cent of 1.8 million items are currently in obsolete formats and that 36 per cent of those collections in this survey are oral history. The Heritage Lottery funded SoS programme will include preserving as much as possible rare and unique sound recordings, most notably oral histories, as well as establishing a national radio archive. The Society's Trustees have been involved in consulting on this imaginative development from the outset and in the next few years we should see the results of the scheme rolling out across the nations and regions through a network of hubs.

The Society's new website is bedding in and we intend to evolve it further in the coming two years to support developments that include Special Interest Groups, new membership packages and a greater use of social media. Much of the work has been overseen by Michelle Winslow as the Society's Web Officer, with the recent support of Eleanor Lowe who joins us as Society administrator. I should also again thank Anthony Greenwood who kindly provided web updates over the period of transition despite having served his time and more as our web support.

Craig Fees, one of our Trustees, has been the champion of the Special Interest Groups (SiGs) and after a year we now have four: Environment, Migration, Schools and Psychosocial Therapies and Care Environments. If we continue at this pace, this remarkable development will transform both the Society and our annual conference. The SiGs initiative addresses one of the key ambitions of the 2013 Plan by bringing members into activity and hopefully into the Society's decision-making structures. We have work to do to represent SiGs interests in the Society's governance structures, but it is a most welcome challenge.

## **Oral History Society**

### **Chairman's Report for the Year Ended 31 December 2015**

We still have to increase our membership in line with the 2013 Plan, but SiGs along with the work of our Membership Secretary, Kate Melvin, provide opportunities for growth. Kate has been developing a number of membership incentives. This includes preferential insurance rates for our freelance members. In complementary efforts, Sarah Lowry (Diversity Officer) has been following up suggestions from the last two AGMs to broaden membership. The next stage will be to establish a supporters' database.

As part of our governance reforms we have started the process of establishing volunteer agreements including with Regional Networkers. Overall, we are moving towards a single Corporate Governance document. However, this will be a process of evolution as the Society hopefully grows. Our overall aim here should be to ensure that the Society's various activities - including the Regional Network, SiGs, Training, and Higher Education - mesh effectively together.

In closing, I want to thank all Trustees, Editors, Assistants, Regional Networkers and Officers of the Society. In particular I should single out Donald Hyslop and Nicola Benghe. Nicola was our Journal Editorial Assistant and the Trustees' Committee Administrator. Although she was only with us for a short period - leaving because of work demands elsewhere - she helped shape both posts. Donald was a long-standing Trustee and served as vice-Chair of the Society. His vision helped shape our last three strategic plans. Finally, a welcome to Amy Tooth Murphy who has joined the Trustees' Committee to provide maternity cover. Amy has played a pivotal part in organising the 2016 conference, but has also brought a fresh eye to our organisation.

Overall 2015/16 has been a productive year for the Oral History Society - on which we will be able to grow our Society further.

**Graham Smith (Chair)**

## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2015**

The trustees present their annual report and accounts for the year ended 31st December 2015.

The board of trustees are satisfied with the performance of the charity during the year and the position at 31st December 2015 and consider that the charity is in a position to continue its activities during the coming year, and that the charity's assets are adequate to fulfil its obligations.

**Report of the Trustees  
for the Year Ended 31 December 2015**

**ACHIEVEMENT AND PERFORMANCE**

**Charitable activities and public benefits provided**

**JOURNAL**

The journal has received some excellent manuscripts during 2015 and early 2016 from the UK and overseas. A partnership with Anne Heimo, Associate professor of Folkloristics at the University of Turku and one of the founders and the current chair of the Finnish Oral History Network is resulting in a special issue (44/2), titled 'Oral history on the move: multiple sites and sources of memory'. This includes articles from the Nordic and Baltic countries which introduce themes and issues which are unique to those contexts but which have general relevance for oral history debates. This is one of several themed issue proposals submitted which the editors have recently been considering.

The journal's reviews section, edited by Anindya Raychaudhury, continues to be strongly representative of the great expansion of publishing in the field of oral history. Alongside, the two news sections, with reports on oral history work in the UK and internationally compiled by Cynthia Brown and Siobhan Warrington respectively continue to provide lively accounts of oral history projects and development in the UK and beyond.

We were delighted to welcome Katy Wild to join us as journal administrator during 2015 following the previous administrator's departure. Amongst other contributions she will be updating the journal pages of the newly designed OHS website directly which will add to our effectiveness generally. We reluctantly said goodbye to Haley Moyses Fenning who had been the journal's Learning editor. She had been working with great enthusiasm with plans to develop that section of the journal but the demands of a new job meant that she was not able to continue. We hope to fill the Learning editor vacancy during the coming year.

Following the OHS annual conference at Royal Holloway University of London, the editors have been able to follow up contributors to several sessions and are discussing possible publication. We hope very much that the 2016 conference will result in even more publications in Oral History, originating as paper presentations.

The editors continue to work with Richard Fontenoy, the copy editor, in teams which include all members of the group. The new editors have already begun to play a part in reviewing submissions and editing issues of the journal. Their individual expertise, teaching and research in oral history are very much welcomed by existing members.

Members of the International Editorial Advisory Group continue to provide the editors with helpful contributions to the editing process, ably co-ordinated by Heather Norris Nicholson.

As ever, we very much appreciate our collaboration with Smith+Bell our designers and wish to express our thanks to them for their help and support in producing a journal which always attracts praise for its attractive appearance.

**Journal editors:**

Zibiah Alfred Loakthar  
Joanna Bornat  
Fiona Cosson  
Jenny Harding  
Heather Norris Nicholson  
Rob Perks  
Anindya Raychaudhuri  
Sheena Rolph

**Joanna Bornat (Editor)**

**Report of the Trustees  
for the Year Ended 31 December 2015**

**ACHIEVEMENT AND PERFORMANCE**

**Charitable activities and public benefits provided**

**WEBSITE**

The Oral History Society website has been undergoing extensive redevelopment and is now maintained by the Sheffield-based web development company, Evoluted. The company took over the work in February 2016 when the society's previous contract with IDZ came to an end. Evoluted are responsible for essential maintenance and specialist development work, whilst the tasks of adding and maintaining content are carried out by nominated OHS trustees. New web pages have recently been created to accommodate OHS Special Interest Groups (SIGs), which were formed in response to members' requests for ways to develop networks and discussion with others who share common interests. The SIG pages are located within the 'About' section of the website. Since the website redesign last year it has also been possible to improve the prominence of upcoming OHS events by featuring them unobtrusively on several pages. Since the website's relaunch in October 2015 and May 2016, 14,000 people have visited it. In order of popularity, the four most visited pages are: Vacancies; 2016 Conference; Training; Legal and Ethical.

Since October 2015 it has been possible to process all training bookings and payments via the website, which was a significant step forward for the society and led to increased bookings, particularly for the 'Introduction to Oral History' course. Online booking has reduced staff administration time and the integration of membership and online booking seems to have prompted an increase in people joining the OHS and making use of training discounts. We will watch with interest to see if this upward trend continues.

The website has grown considerably in size and scope over the past few years, hence in 2016 it became necessary to recruit additional support for day-to-day maintenance work. Eleanor Lowe, recently appointed as OHS Administrator, has been welcomed to the website team and brings her extensive website development experience to the role.

As always, we welcome your thoughts on any aspect of the website. Please get in touch with Michelle Winslow with any comments: [m.winslow@sheffield.ac.uk](mailto:m.winslow@sheffield.ac.uk)

**Michelle Winslow**

**REGIONAL NETWORK**

The Regional Network held its annual event in November 2015 at The Hive in Worcester. It was hosted by the West Midlands Networkers, Maggie Tohill, Julia Letts and Helen Lloyd. Twelve networkers attended the evening business meeting on 13 November to exchange news and discuss issues encountered in their role advising and supporting oral history work in their regions. There were many recurring themes relating to Heritage Lottery Funded (HLF) projects, the increase in the number of freelancers as widespread budget cuts reduce permanent staff at cultural organisations and the rates of fees and salaries in advertised posts.

**Report of the Trustees  
for the Year Ended 31 December 2015**

**ACHIEVEMENT AND PERFORMANCE**

**Charitable activities and public benefits provided**

The main event on Saturday 14th November took the theme: 'Being innovative with oral histories'. In response to requests from networkers, the morning session on the Saturday aims to provide an element of continuing professional development and learning from each other. This year we had a presentation from long-time networker, Pam Schweitzer, speaking about her work developing the Reminiscence Theatre Project and its recent deposit at the University of Greenwich, where it offers a useful resource to students. Led by Julia Letts, the next session looked at projects in Hereford and Worcester that have used innovative approaches to disseminate oral testimony through film, drama, mime, murals, reminiscence and radio. Presentations by Julia Goldsmith from Catcher Media Social and Justin Hughes, Project Officer at The Hive were followed by a tour of The Hive to look at their interactive touch tables, audio stations and other installations. The afternoon session, where we were joined by several local OHS members, included presentations by Elise Turner of the HLF (Grant programmes and Top Tips), Katy Wade of Sampad (My Route project), Maureen Smojkis of the Midlands Polish Community Association (Fitting in and Getting Along film) and Helen Lloyd (Reflections on oral history talks increasing mutual understanding in diverse communities).

Once again, feedback from networkers 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 Maggie Tohill, Julia Letts and Helen Lloyd for hosting such a stimulating and well-organised event.

The location of the annual event of 2016 has not yet been finalised and we welcome any suggestions and offers to host this year's event.

As reported last year, we have implemented formal procedures when recruiting new networkers. A review of current coverage across the regions indicated gaps in some regions - Scotland, Wales, Northern Ireland, Yorkshire and the South East (Kent area) and a call for applications was publicised. We received applications for the Scotland, NI and Yorkshire regions and applicants have been interviewed. Final appointments will be made following approval from the OHS Trustees Committee on 10th June. There were no applicants for the Wales and South East (Kent) vacancies.

In response to feedback from networkers at the business meeting last November, Rob Perks organised two free training workshops exclusively for networkers. The workshops - 'Lives in Focus: video' and 'Archival management of oral history collections' - were held at the British Library in April 2016. This was a great opportunity to benefit from the training and work with fellow networkers. We would like to thank Rob Perks, his team at the British Library and the OHS trainers.

The Regional Network annual report 2015: 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.

New Networkers: Following her recent relocation to Nottingham, Verusca Calabria, former London networker, will now represent the East Midlands region.

## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2015**

#### **ACHIEVEMENT AND PERFORMANCE**

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

Former Networkers: In the last twelve months the following Regional Networkers have left the network and we'd like to express our thanks to them for their contributions and wish them the best of luck in their future ventures:

" South East - Manda Gifford, Jocelyn Dodd

" East Midlands - Christina Raven Conn

**Juliana Vandegrift (Regional Network Coordinator)**

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

#### **MEMBERSHIP**

Over the last year, membership figures have remained largely static. Work has been on-going in designing membership packages for different groups of members such as freelancers, archivists, community groups and so on. The OHS has now partnered with Bluefin Insurance who is able to provide members with professional and public indemnity insurance at highly competitive rates. Over the next year, the OHS will be building upon this and developing new packages for different categories and profiles of members. This will be aligned with the continuing development of the Special Interest Groups so that membership packages are able to be tailor-made to the needs of OHS members. It is anticipated that during 2016-2017, the Supporter Network, a parallel database of those who are interested in the Society but who are not yet members, will grow as a result of the Special Interest Groups and the broader base of interest they have engendered.

**Kate Melvin (Membership Officer)**

#### **TRAINING**

The OHS/British Library training team taught 67 courses to 651 attendees in 2015 comprising 16 'Introduction to oral history' courses, 46 tailored, 2 'Transcript to Script', and one each of 'Lives in Focus' and 'Developing your oral history skills'. Amongst the tailored courses were several in conjunction with the National Trust which has launched a nationwide programme of oral history training bursaries.

Overall numbers were slightly down on 2014. 'Introduction' courses took place in London, Manchester, Worcester and Sheffield. Of attendees on the 'Introduction' course, over 50% came from London and the South East, and a similar percentage paid fees at the full rate (20% at OHS members' rate). 32% of attendees had an academic/research background, 32% were individuals, and 12 % came from museums/galleries (4% from archives). Doctoral research and HLF-funded projects continued to figure significantly, the latter generally requesting tailored training.

Feedback forms for introductory and tailored courses combined average an approval rating of 4.7 out of 5, with lack of time, especially for hands-on with equipment, the lowest rating. This is an issue which the trainers have been grappling with for some time as the one-day course already packs in a huge amount and different attendees use different equipment. It was on the agenda for the annual trainers' day at the British Library in February, which every year assesses feedback from attendees and shares best practice on a host of issues such as copyright and ethics, and technical matters.

A new course was launched in October 2015 - 'Archival management of oral history collections' - in conjunction with the Archives and Records Association (ARA) and aimed specifically at archivists and those working with archives. It has proved very popular and plugs a skills and training gap for archive professionals. Since last year it has been run a further twice, the programme being tweaked in the light of attendee feedback. It was also offered gratis to OHS networkers and committee members.

## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2015**

#### **ACHIEVEMENT AND PERFORMANCE Charitable activities and public benefits provided**

At their meeting the liaison group agreed to explore possible new courses around editing and website publishing; exhibition and gallery use of oral history; and project planning. They also discussed how they could best work with the OHS HE group to provide more advanced training to academics and ensure a joined-up training offer, alongside the development of training and guidance for doctoral supervisors.

The team would like to thank Emily Hewitt and Eleanor Lowe for administering the training programme, and in particular for overseeing the (at times tortured) redevelopment of the OHS website training pages to include online booking and payment via PayPal. After some teething problems this now seems to be working well. Eleanor will also be raising the social media profile of the training programme over the next year.

#### **Rob Perks**

#### **HIGHER EDUCATION**

The OHS Higher Education 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. The group now consists of eight Trustees (Angela Bartie, Joanna Bornat, Fiona Cosson, Jenny Harding, Graham Smith, Shelley Trower, Michelle Winslow and Hilary Young).

In March 2016, the HE group presented a working paper to the OHS Committee aimed at developing a strategy for improving educational provision for postgraduate students using oral history in doctoral research and providing support for supervisors. This paper was a direct response to the increasing volume of requests to the BL/OHS to provide training for PhD students coupled with the reluctance of HEIs to employ oral historians.

The OHS HE group identified three key objectives: a) to meet the educational needs of postgraduates; b) to ensure that oral history is taught to the highest standard and in a sustainable way; and c) to enhance the status of oral history in HEIs. To this end, and in consultation with the Director of the IHR and academics from a range of HEIs, we proposed developing: a programme/syllabus for postgraduate students that could be delivered locally by oral historians already working in HE; a workshop to support supervisors of doctoral students using oral history to be held at the IHR; a network of oral history teachers in HEI; on-line materials for supervisors and postgraduate students, with links to other resources and on-line collections.

This year, the HE group collaborated with the Institute for Historical Research in presenting a fifth Oral History Spring School (in April 2016) and fifth 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, Joel Morley and Paul Thompson. The seminar series, organised by Anne Gulland and Joel Morley, included an interesting range of papers and was generally well attended.

This is the first year that a dedicated HE strand has been included in the OHS annual conference in July 2016. It has focused specifically on teaching oral history in HE and we hope to develop a network of oral history teachers as part of our existing HE network.

#### **Jenny Harding (HE Group)**

#### **PUBLICITY**

I've been in place for five years and have been focusing on improving the OHS's social media presence by:

## Oral History Society

### Report of the Trustees for the Year Ended 31 December 2015

#### ACHIEVEMENT AND PERFORMANCE

##### Charitable activities and public benefits provided

- Posting on Twitter where we now have around 3700 followers (increase of 700 on last year)
- Updating the Facebook page
- Posting messages to the oral history group on LinkedIn.
- Helping to update the revamped OHS 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 more than 1000 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. For example, the recent newsletter mentioning the new migration special interest group resulted in several people directly contacting the convener of the group. I'm sending out newsletters more frequently (used to be once every two to three months) but they are much shorter than before. I have also been trying to include more images on the newsletters but this is difficult as we have very few images. It would be good to have a bank of images so I would like to put a call out to members about this.

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!

Next year I will try to publicise the society and oral history more broadly in other outlets.

**Anne Gulland (Publicity Officer)**

#### DIVERSITY AND INCLUSION

Over the past 12 months we have worked to meet the actions set out in the 2014-17 Diversity and Inclusion Strategy in the following ways:

- The OHS has continued to operate a fair and open recruitment process when seeking new members to join the regional network. This year we advertised opportunities in Scotland, Wales, Northern Ireland, the South East and Yorkshire. Many thanks to Juliana Vandegrift and Padmini Broomfield for all their hard work on this.
- We have continued to run oral history training sessions for a very wide variety of organisations, including the Sheffield Feminist Archive Project, the Muslim Women's Council, Stonewall, and Border Crossings, the organisation that runs the Origins Festival of First Nations. It has been encouraging to see the diversity of current projects.
- We ran a small promotion for Disability History Month advertising some of the archives and projects working in this field. Members can read Paul Hunt's article on the excellent Hidden Now Heard project run by Mencap Cymru here: <http://www.ohs.org.uk/hidden-now-heard/>. We also used the OHS Facebook page to showcase a number of photographs and audio clips from relevant projects. If other groups are interested in doing something similar for a specific awareness event we would be happy to support this.
- Under the direction of Craig Fees the OHS has approved, and started to develop, several Special Interest Groups (SIGs) over the past twelve months. These include a Migration SIG, an LGBT SIG and a Psycho-Social Therapy and Care Environments SIG. The SIGs will provide increased opportunities for OHS members to get involved in the work of the organisation and to meet people working in similar fields. Members can read more about SIGs here: <http://www.ohs.org.uk/about/introducing-special-interest-groups/>

## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2015**

#### **ACHIEVEMENT AND PERFORMANCE**

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

- OHS members who wish to run events for oral history practitioners in their local areas can receive both payment and administrative support through a system established by Mary Stewart and Sarah Lowry. Uptake for this is still extremely low and we would encourage anyone who is interested in taking up this offer to get in touch.
- OHS trustees have committed to providing a small number of bursaries, which will be awarded based on need, for the organisation's annual conference in 2017.

##### **Next steps:**

- At the 2016 conference delegates will be given a simple monitoring form designed to give us an overview of the diversity of those attending. Over the coming year we will work with colleagues to create other systems for assessing the diversity of the OHS membership. Once we have a clearer idea of this we will be able to consider how well the organisation is representing its members and take steps to improve representation if necessary. We would be most grateful if people could complete this form to help the process.

**Sarah Lowry (Diversity and Inclusion Officer)**

#### **SPECIAL INTEREST GROUPS**

##### **SCHOOLS SIG**

The Schools' Special Interest Group was set up in 2015 to promote the understanding and development of oral history among young people including those at both primary and secondary schools. The group has had significant interest from academics, educationalists, teachers, youth groups, museums and archives as well as freelance oral historians. The OHS has now partnered with the Historical Association with the aim of holding a one day seminar and subsequently developing a 'demonstration project'. The aim will be to devise a strategy to broaden the understanding of oral history among those who work with and teach those of school age at the same time as encouraging its use across the curriculum in schools and in other related settings. It is anticipated that this will take place in 2017.

**Kate Melvin**

##### **PSYCHO-SOCIAL THERAPIES AND CARE ENVIRONMENTS SIG**

The groundwork for Special Interest Groups was laid during the Oral History Society's annual conference in 2012, "Displaced Childhoods: Oral History and Traumatic Experiences". A small group of therapists and oral historians met during the conference and felt the need for a formal mechanism for continuing their conversation. Under the Oral History Society umbrella an interim 'Oral History and the Psycho-Social Therapies' group was created, with a website and email discussion group. Full development as a special interest group only became possible, however, following the decision during the Oral History Society Committee's Strategic Review Weekend in September 2013 to become a campaigning organisation, with the subsequent creation of Oral History Society Special Interest Groups in 2015.

'Oral History and the Psycho-Social Therapies' was broadened into 'Psycho-Social Therapies and Care Environments' in 2015 following discussions among members of the group, the Oral History Society Committee, and potential participants among Oral History Society members. It held its Inaugural General Meeting as a new Special Interest Group on April 26th at the Planned Environment Therapy Trust in Gloucestershire, adopting formal Terms of Reference and electing a committee, and holding a successful inaugural conference on the following day, as reported below.

## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2015**

#### **ACHIEVEMENT AND PERFORMANCE**

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

The Group's email discussion group currently has 31 members.

An inaugural General Meeting was held on 26th April 2016. There were sixteen people present at the meeting, five of whom were observers. Two of the eleven Oral History Society members arrived late, but were able to make a contribution to the discussions and decisions of the meeting. The committee was elected, and consists of the following officers and members:

Chris Scanlon, **Chair**

Miranda Quinney, **Secretary**

Tom Harrison, **Treasurer**

Kate Brown, **Committee**

Carolyn Mears, **Committee**

Verusca Calabria, **OHS Trustee Liaison member**

Craig Fees, **OHS Trustee Liaison member**

Following vigorous discussion about the Group's remit and purpose, and how effectively those are reflected and represented in the name, the Terms of Reference were adopted, and are appended. Membership in the Committee is still open, and SIG members are welcome to put themselves forward to serve.

An inaugural conference was held on 27th April 2016. Twenty-six people took part in the following-day's launch conference, "Starting a conversation: 'Where I'm coming from/Where I am'", eight of whom were not members of the Oral History Society at the time, and two of whom, although members of the Society, were not members of the Special Interest Group. Newly-elected Chair Dr. Chris Scanlon opened the event. SIG member and Scottish Oral History Group Chair Howard Mitchell started the day's conversation by sharing and reflecting on his own formation and career as an oral historian in a presentation entitled "Schedules of Reinforcement for the Oral Historian".

The conference then broke into three 45-minute facilitated groups to enable conference members to meet, share where they were coming from and what they were doing, and to raise questions and issues to animate the day. Group facilitators were Dr. Jonathan Leach of the Open University, Dr. Tom Harrison of the University of Birmingham, and Dr. Craig Fees of the Planned Environment Therapy Trust.

Participants were brought back together for a second and highly personal self-reflective journey into her life and development as an oral historian by Oral History Society Trustee, and University Teacher in Adult Palliative and End of Life Care in the School of Nursing and Midwifery at the University of Sheffield, Dr. Michelle Winslow. Her powerful presentation brought the morning session of the conference to a close, epitomising participant Sam Martin's observation that the conference "was a fascinating reminder of the complexities of oral history with teasing glimpses of still-untapped potential."

The conference broadened after lunch into two parallel sessions featuring four separate papers, and discussion. SIG Secretary Miranda Quinney, of Sharing Stories for Wellbeing, chaired OHS Trustee and PhD student Verusca Calabria's "Insider Stories from the Asylum: The Role of Social Support and Networks", and Len Clarke and Will Eiduk's presentation on the roots, work, and ramifications of their "Early Pestalozzi Children Project." Dr. David Jones of the University of East London chaired psychotherapist and PhD student Kate Brown's "Back to the Future - from practitioner to historian of the Cotswold Community", and Dr. Tom Harrison's "Through the (one-way) Looking Glass: From Clinician to Historian", the personal reflections of a consultant psychiatrist using oral history as he makes the transition into an academic historian.

## Oral History Society

### Report of the Trustees for the Year Ended 31 December 2015

#### ACHIEVEMENT AND PERFORMANCE

##### Charitable activities and public benefits provided

The whole conference then came back together again for Dr. Carolyn Mears' discussion of her roots as an oral historian and trauma researcher in the highly personal experience as the mother of a son caught up in the Columbine High School shootings in Colorado in 1999; an "articulate and profound" presentation, in the words of Len Clarke and Will Eiduks; a "powerful session to end the day", according to Sam Martin. The conference itself then concluded with a large group discussion, facilitated by David Kennard, group analyst and former Director of the Tuke Centre for Psychotherapy and Counselling at The Retreat, in York.

Participant Tom Harrison wrote afterwards "Something important has happened over the past two days..." It was certainly an important start for a new Special Interest Group. A small surplus will have been made to facilitate the future work of the group, and recordings of the conference presentations were made, a number of which are available on the PST&CE pages of the Oral History Society website.

Future work: The new committee met during the course of the conference, and began the process of looking ahead. The Group will be represented at the Oral History Society's Annual Conference in July 2016. Group member Pam Schweitzer had tabled the offer of a special workshop for Group members on reminiscence work, to be held in Greenwich, and a proposal had arisen from the conference itself for another conference, on ethics, perhaps in association with the new Migration SIG, and workers with homelessness and other vulnerable populations.

##### Craig Fees

#### ENVIRONMENT AND CLIMATE CHANGE SIG

Following the OHS AGM in July 2015, the Committee received a proposal from OHS member Allan Shepherd to set up a Special Interest Group (SIG) for oral historians engaged in research into the environment.

"The aim of the ECC-SIG is to bring oral historians working in environment and climate change fields together to gather and share knowledge, to explore these questions and formulate an Oral History Society (OHS) response that can be useful for the wider oral history community." Allan Shepherd proposal

Feedback from committee members suggested widening the remit to include topics on climate change and in August 2015, two trustees, Shelley Trower and Padmini Broomfield, volunteered to act as the liaison between the Committee and the new Environment and Climate Change SIG. The ECC-SIG was publicised through the OHS website, newsletter and Twitter inviting members to join the group.

##### Progress so far with the main achievements:

- 13 members have signed up to the group and received the proposal stating its aims and development strategy.
- Members were invited to contribute suggestions for participation and preferred communication methods.
- The ECC-SIG has page on the OHS website.
- Allan Shepherd has submitted suggestions for securing external funding for meetings and activities.
- A Google group has been set up to facilitate sharing of resources and information
- The group plan to hold a lunchtime drop-in session at the OHS annual conference in July 2016 to **"meet to find a way to develop the group and find people interested in active participation. The group exists to bring together people working in the field and to find ways of developing future projects with the possibility of creating a common approach to oral histories that relate to the environment. ECCSIG is a fledgling group. This will be its first gathering as a group, so the session will be a chance for people to connect and share ideas."**

## Oral History Society

### Report of the Trustees for the Year Ended 31 December 2015

#### ACHIEVEMENT AND PERFORMANCE

##### Charitable activities and public benefits provided

We welcome new members to join the group.

**Allan Shepherd, Shelley Trower and Padmini Broomfield**

#### MIGRATION SIG

The Migration Special Interest Group (MSIG) was launched in April 2016. It seeks to bring together Oral History Society members with an interest in issues related to migration, both forced and voluntary. This is likely to include people working within the fields of refugee and migration studies, and those who are otherwise interested in the issues and practice involved. The group Convenor is Paul Dudman, Archivist, Library & Learning Service: Archives Library and Learning Centre at the University of East London. Liaison between MSIG and the Oral History Society Committee is provided by Cynthia Brown, Craig Fees and Sarah Lowry, who are all Trustees of the Society.

MSIG is still at an early stage, but hopes to promote the following activities:

- Community engagement and the sharing of knowledge through events, including workshops, seminars, webinars, working papers, its web pages, and social media.
- Networking opportunities for the exchange of information between academics, students, researchers, practitioners and members of the public.
- Collaboration with other networks, both nationally and internationally, to help connect with the international migration issues as recorded through oral history.
- Raising awareness and promotion of the value, relevance and importance of 'refugee archives' for education, research, heritage and community engagement.
- Creating a social media presence to facilitate the exchange of ideas and information about oral history projects related to migration issues.
- Providing access to news, online content and funding opportunities.
- Collating information about existing oral history projects in the UK that relate to refugee and migration issues.
- Establishing a database of existing UK projects that seek to engage with issues related to refugee and migration issues (depending on resources within the group).

For more information, or to join MSIG, contact Paul Dudman at [p.v.dudman@uel.ac.uk](mailto:p.v.dudman@uel.ac.uk).

**Cynthia Brown**

#### 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 £63,687 (prior year £57,406) and outgoing resources of £53,416 (prior year £44,309), making net overall surplus of £10,271, (prior year £13,097). Free unrestricted reserves amounted to £76,238 (prior year £65,967).

## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2015**

#### **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 charitycharity 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  
Univerisity of London  
Egham Hill  
Egham  
TW20 0EX

##### **Trustees**

Joanna Bornat  
Cynthia Brown  
Verusca Calabria  
Nicholas Chalmers (Treasurer) appointed July 2015  
Fiona Cosson  
Alan Dein  
Craig Fees  
Anne Gulland  
Donald Hyslop (retired July 2015)  
Jenny Harding  
Kate Melvin  
Sarah Lowry  
Robert Perks (Secretary)  
Graham Smith (Chair)  
Mary Stewart  
Beth Thomas (Vice Chair)  
Shelley Trower  
Wendy Ugolini (retired July2015)  
Juliana Vandegrift  
Robert Wilkinson  
Michelle Winslow  
Hilary Young

**Report of the Trustees  
for the Year Ended 31 December 2015**

**REFERENCE AND ADMINISTRATIVE DETAILS**

**Independent examiner**

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

**STATEMENT OF TRUSTEES RESPONSIBILITIES**

The trustees are responsible for preparing the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice), including Financial Reporting Standard 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland".

The law applicable to charities in England and Wales, the Charities Act 2011, Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charity for that period. In preparing those financial statements, the trustees are required to

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charity SORP;
- make judgements and estimates that are reasonable and prudent;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the trust deed. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

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 2015 set out on pages eighteen to twenty three.

### **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.

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

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 2015**

	Notes	<b>31.12.15 Unrestricted fund £</b>	31.12.14 Total funds £
<b>INCOME AND ENDOWMENTS FROM</b>			
Donations and legacies		<b>12,886</b>	2,597
Other trading activities	2	<b>50,159</b>	54,732
Investment income	3	<b>642</b>	77
<b>Total</b>		<b>63,687</b>	57,406
<b>EXPENDITURE ON</b>			
Raising funds		<b>45,239</b>	40,261
<b>Charitable activities</b>			
General		<b>8,177</b>	4,048
<b>Total</b>		<b>53,416</b>	44,309
<b>NET INCOME</b>		<b>10,271</b>	13,097
<b>RECONCILIATION OF FUNDS</b>			
<b>Total funds brought forward</b>		<b>65,967</b>	52,870
<b>TOTAL FUNDS CARRIED FORWARD</b>		<b>76,238</b>	65,967

**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 2015

	Notes	£	31.12.15 Unrestricted fund £	31.12.14 Total funds £
<b>CURRENT ASSETS</b>				
Debtors	6		4,020	-
Cash at bank			77,690	74,578
			<u>81,710</u>	<u>74,578</u>
<b>CREDITORS</b>				
Amounts falling due within one year	7		(5,472)	(8,611)
			<u>76,238</u>	<u>65,967</u>
<b>NET CURRENT ASSETS</b>				
			<u>76,238</u>	<u>65,967</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>			<u>76,238</u>	<u>65,967</u>
<b>NET ASSETS</b>			<u>76,238</u>	<u>65,967</u>
<b>FUNDS</b>	8			
Unrestricted funds			76,238	65,967
<b>TOTAL FUNDS</b>			<u>76,238</u>	<u>65,967</u>

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

.....  
Trustee

The notes form part of these financial statements

**Notes to the Financial Statements  
for the Year Ended 31 December 2015**

**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 2015

2. OTHER TRADING ACTIVITIES

	31.12.15	31.12.14
	£	£
Income from Conferences	11,409	14,539
Sale of Back Issues	6	71
Subscription Income	32,979	35,713
Sundries	2,684	1,909
Advertising	306	500
Other Generating Funds	2,775	2,000
	<u>50,159</u>	<u>54,732</u>

3. INVESTMENT INCOME

	31.12.15	31.12.14
	£	£
Deposit account interest	<u>642</u>	<u>77</u>

4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 December 2015 nor for the year ended 31 December 2014.

Trustees' expenses

	31.12.15	31.12.14
	£	£
Trustees' expenses	<u>2,303</u>	<u>2,200</u>

5. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £
<b>INCOME AND ENDOWMENTS FROM</b>	
Donations and legacies	2,597
Other trading activities	54,732
Investment income	77
<b>Total</b>	<u>57,406</u>

Notes to the Financial Statements - continued  
for the Year Ended 31 December 2015

5. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES - continued

	Unrestricted fund £
<b>EXPENDITURE ON</b>	
Raising funds	40,261
<b>Charitable activities</b>	
General	4,048
	<hr/>
<b>Total</b>	44,309
	<hr/>
<b>NET INCOME</b>	13,097
	<hr/>
<b>RECONCILIATION OF FUNDS</b>	
<b>Total funds brought forward</b>	52,870
	<hr/>
<b>TOTAL FUNDS CARRIED FORWARD</b>	<u>65,967</u>

6. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.12.15	31.12.14
	£	£
Trade debtors	4,020	-
	<hr/>	<hr/>

7. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.12.15	31.12.14
	£	£
Other creditors	5,472	8,611
	<hr/>	<hr/>

Notes to the Financial Statements - continued  
for the Year Ended 31 December 2015

8. MOVEMENT IN FUNDS

	At 1/1/15 £	Net movement in funds £	At 31/12/15 £
<b>Unrestricted funds</b>			
General fund	65,967	10,271	76,238
	<hr/>	<hr/>	<hr/>
<b>TOTAL FUNDS</b>	<u>65,967</u>	<u>10,271</u>	<u>76,238</u>

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

	Incoming resources £	Resources expended £	Movement in funds £
<b>Unrestricted funds</b>			
General fund	63,687	(53,416)	10,271
	<hr/>	<hr/>	<hr/>
<b>TOTAL FUNDS</b>	<u>63,687</u>	<u>(53,416)</u>	<u>10,271</u>

9. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 December 2015.

10. FIRST YEAR ADOPTION

**Transitional relief**

On transition to FRS 102, the charity has taken advantage of the following transitional relief:

## Oral History Society

### Reconciliation of Income and Expenditure for the Year Ended 31 December 2014

	Notes	UK GAAP £	Effect of transition to FRS 102 £	FRS 102 £
<b>INCOME AND ENDOWMENTS FROM</b>				
Donations and legacies		2,597	-	2,597
Other trading activities		54,732	-	54,732
Investment income		77	-	77
		<hr/>	<hr/>	<hr/>
<b>Total</b>		57,406	-	57,406
<b>EXPENDITURE ON</b>				
Raising funds		40,261	-	40,261
Charitable activities		732	3,316	4,048
Governance costs		3,316	(3,316)	-
		<hr/>	<hr/>	<hr/>
<b>Total</b>		44,309	-	44,309
		<hr/>	<hr/>	<hr/>
<b>NET INCOME</b>		13,097	-	13,097
		<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

**Oral History Society**

**Reconciliation of Funds**

**At 1 January 2014**

**(Date of Transition to FRS 102)**

	Notes	UK GAAP £	Effect of transition to FRS 102 £	FRS 102 £
		<u>-</u>	<u>-</u>	<u>-</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		<u>-</u>	<u>-</u>	<u>-</u>
		<u>-</u>	<u>-</u>	<u>-</u>
		<u>-</u>	<u>-</u>	<u>-</u>
<b>FUNDS</b>		<u>-</u>	<u>-</u>	<u>-</u>
<b>TOTAL FUNDS</b>		<u>-</u>	<u>-</u>	<u>-</u>

**Oral History Society**

**Reconciliation of Funds  
At 31 December 2014**

	Notes	UK GAAP £	Effect of transition to FRS 102 £	FRS 102 £
<b>CURRENT ASSETS</b>				
Cash at bank		74,578	-	74,578
<b>CREDITORS</b>				
Amounts falling due within one year		(8,611)	-	(8,611)
<b>NET CURRENT ASSETS</b>		<u>65,967</u>	<u>-</u>	<u>65,967</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		<u>65,967</u>	<u>-</u>	<u>65,967</u>
<b>NET ASSETS</b>		<u><u>65,967</u></u>	<u><u>-</u></u>	<u><u>65,967</u></u>
<b>FUNDS</b>				
Unrestricted funds		<u>65,967</u>	<u>-</u>	<u>65,967</u>
<b>TOTAL FUNDS</b>		<u><u>65,967</u></u>	<u><u>-</u></u>	<u><u>65,967</u></u>

## Oral History Society

### Detailed Statement of Financial Activities for the Year Ended 31 December 2015

	31.12.15 £	31.12.14 £
<b>INCOME AND ENDOWMENTS</b>		
<b>Donations and legacies</b>		
Donations	9,766	30
Gift aid	3,120	2,567
	<hr/>	<hr/>
	12,886	2,597
<b>Other trading activities</b>		
Income from Conferences	11,409	14,539
Sale of Back Issues	6	71
Subscription Income	32,979	35,713
Sundries	2,684	1,909
Advertising	306	500
Other Generating Funds	2,775	2,000
	<hr/>	<hr/>
	50,159	54,732
<b>Investment income</b>		
Deposit account interest	642	77
	<hr/>	<hr/>
<b>Total incoming resources</b>	<b>63,687</b>	<b>57,406</b>
<b>EXPENDITURE</b>		
<b>Raising donations and legacies</b>		
Subscription Services	4,777	4,299
Printing and Publishing	19,420	16,687
Conference Costs	11,727	15,337
Regional Works	1,527	1,060
Training	7,788	2,842
Reviews	-	36
	<hr/>	<hr/>
	45,239	40,261
<b>Charitable activities</b>		
Stationary and Printing	1,819	93
Bank Charges	667	596
Carried forward	2,486	689

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 2015**

	<b>31.12.15</b>	31.12.14
	<b>£</b>	£
<b>Charitable activities</b>		
Brought forward	2,486	689
Sundries	138	43
Travel	1,204	-
Administrator	930	-
	<u>4,758</u>	<u>732</u>
<b>Support costs</b>		
<b>Governance costs</b>		
Trustees' expenses	2,303	2,200
Accountancy and legal fees	1,116	1,116
	<u>3,419</u>	<u>3,316</u>
<b>Total resources expended</b>	<b>53,416</b>	44,309
	<u>          </u>	<u>          </u>
<b>Net income</b>	<b>10,271</b>	13,097
	<u>          </u>	<u>          </u>

This page does not form part of the statutory financial statements