

## Oral History Society's Chair's Report 2013

Local historians can perhaps make the most convincing claims of taking the earliest initiatives in oral history in Britain in the twentieth century. It was noted in an edition of the *Amateur Historian* in 1957, for example, that 'the collection of information from old people does not feature in the textbooks, yet it is an essential process in compiling local history'.<sup>1</sup> Since then oral history has developed and changed in a number of different ways.

In 1969 an informal day conference at the British Institute of Recorded Sound (BIRS) led to the formation of a steering group that would go on four years later to establish the Oral History Society. The conference was mainly attended by academics. There were folk historians, labour historians and sociologists, but there was also significantly a representative from BIRS, which would later become the British Library Sound Archive, and a member of staff from the British Broadcasting Company (BBC).

Labour and social historians were central to the early development of the Society and oral history more broadly. This included Asa Briggs, Brian Harrison, Raphael Samuel (1934-1996) and John Saville (1916-2009) who would become Chair of the Society. Another important influence in our development came from women's history and included contributions from Jill Norris and Jill Liddington (a Committee member in the early 1980s and twenty years later an editor of the journal's public history section). The second themed *Oral History* journal published in 1977 was on 'Women's history' and included contributions from Joanna Bornat (our longest serving Trustee and member of our journal editorial team) and Elizabeth Roberts (a Society Vice-President).

The Oral History Society is a democratic membership based organisation, registered as a charity (since 1983); with around a thousand members mainly located in Britain. As well as an annual conference, the Society also offers regular training courses, workshops and day conferences, often in conjunction with other national organisations. The Society's Higher Education group organises an on-going seminar series and an annual advanced school. Underpinning the support to community oral historians and projects is the Regional Network with representatives in localities across Britain and Northern Ireland. In addition, the Society represents the interests of oral historians to national organisations and raises issues of funding, archiving and the use of oral history in different settings, including the media. The Society's website, membership newsletter, e-noticeboard and *Oral History* journal remain the most important routes through which news and ideas are disseminated (see <http://www.ohs.org.uk>). Responsible for coordinating all of this is a committee of Trustees (the Committee).

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<sup>1</sup> L. Dopson, 'Old people as sources of history', *Amateur Historian* (1957), Vol, 3, No. 4, 150-2.

Over the next four decades the application of ideas about gender and class would be developed, adapted and reapplied, including in oral histories of ethnicity and sexuality. However, other influences have somewhat faded. For example, oral tradition so evident in the early years of the Society, has subsequently declined as a presence in oral history, although not elsewhere. Making Doc Rowe one of our Vice-Presidents in part acknowledges the past role of folk studies, although his contribution to oral history is greater than this.

In terms of the theories promoted by the Society, especially through the journal, conferences and training, there has been a series of changes in emphasis over the last forty years. Not all of these can or should be read as a straightforward narrative of progress. For example, while there was growing attention to the living memory of individuals as well as 'collective' memory, especially from around 1990 onwards, there were also indications that the influence of the reminiscence movement within oral history had peaked and had begun to tail off by the end of the 1990s.

Changes within modern oral history have also attracted at different times a diverse range of disciplinary interests beyond History. Social scientists, sociologists and psychologists, as well as archivists, museum and library staff have all joined the Society at different times from the mid-1970s onwards. And then there have been the television and radio broadcasters who have long been interested in the potential uses of oral history. Stephen Peet (1920-2005) who served as a Trustee, Steve Humphries (another of our four Vice Presidents) and Alan Dein (who is currently a Trustee) are amongst their number. Oral history owes a debt to these individuals who did so much to popularise oral history

In the early years of oral history in Britain the Sociology Department at the University of Essex played a key role. Initiatives at Essex were led by Paul Thompson, who was also the founding editor of *Oral History*, and for many years (c. 1969-1991) the Society's driving force. The foothold at Essex was especially significant given that oral history was increasingly being met with antagonism from mainstream academics; hostility that just as often extended to the socialist and feminist influences that were shaping oral history at the time.

By the mid-1980s while state research funding was becoming limited for university based oral history, community projects were booming, especially as a result of the Manpower Services' Commission's Community Programme. A key layer of oral historians developed projects and their practices in this period. These included amongst hundreds of others Rob Perks, currently our Secretary and a journal editor, and Robert Wilkinson, our Treasurer. Both have subsequently shaped the Society and each of them in different ways has contributed to the development of oral history in Britain.

More broadly the Society has always tended to reflect the shifting material base of oral history activity both in who joins and in the make-up of the Committee. In the early 1970s the Society had started out as an initiative rooted in the university sector with a steering committee that was overwhelmingly filled with academics. By the late 1980s it was increasingly community activists who were becoming members and Trustees. In recognition of this shift the Regional Network was established. In 1992 the journal published for the first time a list of Network representatives around the country offering local support and advice to community organisations and individuals.

The original proposal to establish a community network of Society members had been rejected on a number of occasions by the Committee in the mid to late 1980s. In part this arose from a concern that such a development would lead to the professionalisation of oral history, militating against the long held belief by the Society that oral history should be open to all. There was also a worry amongst some Trustees that establishing a Regional Network would signal that the Society was placing too much emphasis on community oral history. However, the Regional Network has proven an important first point of contact for many, and a focus of energetic activity at least in some regions. The significance of the Network to the Society is recognised in the recent study undertaken by the Society's membership secretary, Kate Melvin, and on behalf of the Committee I would like to thank the members who gave time and energy to help with Kate's research.

Reinforcing this shift in activity, a second wave of community projects emerged from the late 1990s onwards thanks largely to the support of the Heritage Lottery Fund. Again this has developed a new generation of community oral historians who have joined the Committee including Verusca Calabria, who serves on our Nominations Sub-committee. As well as Verusca, Juliana Vandegrift, the Regional Network coordinator, and Sarah Lowry, our Diversity Officer, continue to work on and manage community based projects. Other Committee members with a wealth of experience in community oral history include Cynthia Brown, who is a leading member of our Trainers' Group and who edits the members' Newsletter. There is also Padmini Broomfield, the Deputy Regional Network Co-ordinator, who was a long-term member of the Southampton Oral History Unit.

As well as the general growth of freelance oral historians serving community projects, it should be recognised that some of this community located work has long involved policy development. Oral history, for example, has increasingly become a method of consultation. This is happening not just in Britain, but also across the world with Siobhan Warrington, our journal's international work editor, having been engaged in policy oral history projects across a range of international contexts.

The importance of archiving oral history has been a key part of the Society's sensibilities since the 1970s. Today, we have two Trustees and a Vice President (Alan Ward) with British Library Sound Archive (BLSA) connections. As well as Rob Perks, our third BLSA colleague is Mary Stewart who as a Trustee has injected a great deal of energy into developing our training portfolio. The collaboration between BLSA and the Society continues to produce important synergies. Craig Fees is another archivist who serves as a Trustee. In addition to helping to organise last year's thought provoking conference 'Displaced Childhoods: Oral History and Traumatic Experiences', he is a member of the Society's Archives sub-committee.

Another central plank in the Society's long-term thinking has been the importance of ethical and legal standards. Alan Ward produced our first set of guidelines in 1995. This year Rob Perks along with Joanna Bornat, took on the enormous effort of bringing our ethical and legal guidelines up to date. The impressive result can be found on <http://www.oralhistory.org.uk/ethics.php>; a hypertext document that also involved a great deal of input from our Web team headed by Michelle Winslow.

Since the 1980s there have been a number of Trustees who are based in museums. Currently this includes Beth Thomas, the Society's vice-Chair, who has recently been appointed Keeper of History and Archaeology at the National Museum of Wales. Another Trustee, Hilary Young also brings to the

Committee experience of museum oral history, and is currently employed with the Museum of London's Recorded Media Project.

The Society has maintained a lengthy connection with organised oral history in Scotland: in 1973, for example, the spring issue of *Oral History* was described as 'a Scottish number' and we have long been supportive of the activities of the Scottish Oral History Group. This connection continues with Wendy Ugolini representing the Scottish Oral History Group on the Committee.

Wendy is also a member of our Higher Education (HE) group. The core of the HE group consists of the six Trustees (out of a total of twenty-three) who are currently within the university sector. This is a marked change from 1983 and reflects structural shifts within the history of oral history in Britain more broadly. It should also be noted that the minority of oral historians who were employed in university posts from the 1980s onwards tended to find work outside history departments and in departments such as continuing education (including Al Thomson, who was a journal editor from 1991 to 2007). Amongst current Trustees HE group members are located in health and social welfare (Joanna Bornat and Jenny Harding), medicine (Michelle Winslow), and English and Creative Writing (Shelley Trower). History departments and centres have only recently recognised the need to employ oral historians (including Fiona Cosson and Graham Smith).

Given the small numbers of university based oral historians the capacity to teach and supervise oral history has remained relatively small, although this has only recently become problematic with the dramatic rise in demand from amongst undergraduate and postgraduate students to study and do oral history. In response the Trustees identified HE as a priority area and from 2009 onwards with Trustees Anna Green and Shelley Trower taking responsibility in this area. With Anna's return to New Zealand, Jenny Harding has taken on the role of coordinating the HE group, with Shelley and Michelle organising our second seminar series with the Institute of Historical Research (IHR) at the University of London. This activity, as in so much else, is ably supported by Anne Gulland the Society's Publicity Officer. The HE group has also held a second successful Advanced School again in collaboration with IHR.

In four decades the Society has grown from less than fifty members to just over a thousand. Partly as a result of that growth and the development of oral history more generally, it became evident by the end of the 1990s that the Society would need to design new strategies and structures. The Trustees of the Society therefore began holding periodic review and strategy meetings in five yearly cycles. These have been informed by membership surveys and research with key constituencies including the Regional Network. Underpinning planning has been a desire to make the Society a more professional organisation without professionalising oral history.

The 2004 review sought to clarify the relationship between the Regional Network and the Society, improve the Society's virtual on-line presence and identity and develop stronger administrative support for Officers and Trustees. Recurring aims through the 2004 and 2009 reviews have included bringing younger people into the Society's leadership, expanding services to members and raising the Society's public profile. Our next review to be held later this year will discuss how we can again meet changing demand and continuing growth. There are organisational questions to be addressed. How, for example, can a relatively small Society meet increasing demands and continue to play a part in the development of oral history?

A recent discussion at Trustees' Committee suggests that the forthcoming review will look again at our communication strategy. In the last period we have seen a number of marked improvements especially in publicity. As well as a regular e-newsletter, edited by Cynthia Brown, the Society adopted the Oral History Noticeboard (<http://oralhistorynoticeboard.wordpress.com>), run by Fiona Cosson. This is supplemented by an internal e-discussion list and an open-to-all website. In 2012/2013 the website averaged 10,012 unique visitors per month, with traffic rising after the web site redesign. Our Facebook pages and Twitter feeds are also experiencing rising numbers of subscribers. However, there is now a question about whether this activity requires a greater degree of oversight and coordination.

The Society remains an organisation that is mainly founded on voluntary effort. Trustees, including Officers, Networkers and journal editors are all unpaid and it is important to acknowledge that it is their hard work and dedication that promotes the Society as a dynamic presence in both community and academic spheres. We also have in recent years employed a group of paid assistants to support administration, particularly in organising training provision, conference organisation, journal duties and website development, design and maintenance. So thank you Anthony Greenwood for keeping our web presence relevant and sharp as well as for your patience when asked by Trustees, including me, to do the near impossible. Thanks also to Belinda Waterman, who each and every year calmly produces a sensible organisational plan for our annual conference regardless of the challenges we might collectively pose. And many thanks to Elspeth Millar and Haley Moyse, for their thoughtful efficiency in assisting with training organisation and journal production.

The journal editors have produced two strong issues in the last year. *Oral History* is one of the last remaining journals that are independent from the publishing empires that dominate the market. It is remarkable that the journal continues to be produced to a standard that outstrips the all too often dull products overseen by faceless corporations. The journal's very existence depends on our editors and contributors. So keep sending in articles to our dedicated editorial team.

In closing, the Society might be thought to have become a representative aggregation of different and increasingly specialised activities within oral history, including museum, media, archive and academy. Although arguably, the range of interests may have narrowed, perhaps reflecting a narrowing within oral history itself. So, for example and as noted, reminiscence and oral tradition, including an interest in dialect, have become less significant, as the focus on memory and narrative has tightened. Meanwhile, oral historians who work in community settings, including freelancers, find themselves driven by differing and changing concerns and debates such as the ways that funding might be shaping oral history practices. For those employed within Higher Education the challenge is to increase capacity to meet demand while maintaining the quality required in a strongly regulated and increasingly competitive sector.

The need to support and develop oral history has not changed.

There is still a lot for the Oral History Society to do.

**Graham Smith**  
**22<sup>nd</sup> June 2013.**

**REGISTERED CHARITY NUMBER: 0288805**

**Report of the Trustees and  
Financial Statements for the Year Ended 31 December 2012  
for  
Oral History Society**

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

# Oral History Society

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## **Oral History Society**

### **Report of the Trustees for the Year Ended 31 December 2012**

The trustees present their report with the financial statements of the charity for the year ended 31 December 2012. The trustees have adopted the provisions of the Statement of Recommended Practice (SORP) 'Accounting and Reporting by Charities' issued in March 2005.

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

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

0288805

##### **Principal address**

National Sound Archive  
British Library  
96 Euston Road  
London  
NW1 2DB

##### **Trustees**

##### **Independent examiner**

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

#### **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 which the charity is exposed and to ensure appropriate controls are in place to provide reasonable assurance against fraud and error.

#### **ON BEHALF OF THE BOARD :**

.....  
Trustee

Date: .....

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

I report on the accounts for the year ended 31 December 2012 set out on pages four to eight.

### **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 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 2012

	Notes	31.12.12 Unrestricted funds £	31.12.11 Total funds £
<b>INCOMING RESOURCES</b>			
<b>Incoming resources from generated funds</b>			
Voluntary income		1,581	1,435
Activities for generating funds	2	36,981	32,459
Investment income	3	1,769	1,766
		<hr/>	<hr/>
<b>Total incoming resources</b>		40,331	35,660
 <b>RESOURCES EXPENDED</b>			
<b>Costs of generating funds</b>			
Costs of generating voluntary income		34,364	31,005
<b>Charitable activities</b>			
General		2,670	642
<b>Governance costs</b>		2,853	2,621
		<hr/>	<hr/>
<b>Total resources expended</b>		39,887	34,268
		<hr/>	<hr/>
<b>NET INCOMING RESOURCES</b>		444	1,392
 <b>RECONCILIATION OF FUNDS</b>			
<b>Total funds brought forward</b>		56,412	55,020
		<hr/>	<hr/>
<b>TOTAL FUNDS CARRIED FORWARD</b>		56,856	56,412
		<hr/> <hr/>	<hr/> <hr/>

The notes form part of these financial statements

**Oral History Society**

**Balance Sheet  
At 31 December 2012**

	Notes	<b>31.12.12 Unrestricted funds £</b>	31.12.11 Total funds £
<b>CURRENT ASSETS</b>			
Cash at bank		66,574	67,007
<b>CREDITORS</b>			
Amounts falling due within one year	5	(9,718)	(10,595)
<b>NET CURRENT ASSETS</b>		<u>56,856</u>	<u>56,412</u>
<b>TOTAL ASSETS LESS CURRENT LIABILITIES</b>		56,856	56,412
<b>NET ASSETS</b>		<u><u>56,856</u></u>	<u><u>56,412</u></u>
<b>FUNDS</b>	6		
Unrestricted funds		<u>56,856</u>	<u>56,412</u>
<b>TOTAL FUNDS</b>		<u><u>56,856</u></u>	<u><u>56,412</u></u>

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

.....  
Trustee

## Oral History Society

### Notes to the Financial Statements for the Year Ended 31 December 2012

#### 1. ACCOUNTING POLICIES

##### Accounting convention

The financial statements have been prepared under the historical cost convention, and in accordance with the Financial Reporting Standard for Smaller Entities (effective April 2008), the Charities Act 2011 and the requirements of the Statement of Recommended Practice, Accounting and Reporting by Charities.

##### Incoming resources

All incoming resources are included on the Statement of Financial Activities when the charity is legally entitled to the income and the amount can be quantified with reasonable accuracy.

##### Resources expended

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.

#### 2. ACTIVITIES FOR GENERATING FUNDS

	<b>31.12.12</b>	31.12.11
	£	£
Income from Conferences	10,960	6,540
Sale of Back Issues	352	204
Subscription Income	22,886	23,659
Sundries	2,149	1,793
Advertising	580	155
Other Generating Funds	54	108
	<u>36,981</u>	<u>32,459</u>

## Oral History Society

### Notes to the Financial Statements - continued for the Year Ended 31 December 2012

#### 3. INVESTMENT INCOME

	<b>31.12.12</b>	31.12.11
	£	£
Deposit account interest	1,769	1,766

#### 4. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 December 2012 nor for the year ended 31 December 2011 .

##### Trustees' expenses

	<b>31.12.12</b>	31.12.11
	£	£
Trustees' expenses	1,737	1,505

#### 5. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	<b>31.12.12</b>	31.12.11
	£	£
Other creditors	9,718	10,595

#### 6. MOVEMENT IN FUNDS

	<b>At 1/1/12</b>	<b>Net movement in funds</b>	<b>At 31/12/12</b>
	£	£	£
<b>Unrestricted funds</b>			
General fund	56,412	444	56,856
<b>TOTAL FUNDS</b>	56,412	444	56,856

## Oral History Society

### Notes to the Financial Statements - continued for the Year Ended 31 December 2012

#### 6. MOVEMENT IN FUNDS - continued

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

	<b>Incoming resources £</b>	<b>Resources expended £</b>	<b>Movement in funds £</b>
<b>Unrestricted funds</b>			
General fund	40,331	(39,887)	444
	<hr/>	<hr/>	<hr/>
<b>TOTAL FUNDS</b>	<b>40,331</b>	<b>(39,887)</b>	<b>444</b>
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

## Oral History Society

### Detailed Statement of Financial Activities for the Year Ended 31 December 2012

	<b>31.12.12</b>	31.12.11
	£	£
<b>INCOMING RESOURCES</b>		
<b>Voluntary income</b>		
Donations	42	86
Gift aid	1,539	1,349
	<hr/>	<hr/>
	1,581	1,435
<b>Activities for generating funds</b>		
Income from Conferences	10,960	6,540
Sale of Back Issues	352	204
Subscription Income	22,886	23,659
Sundries	2,149	1,793
Advertising	580	155
Other Generating Funds	54	108
	<hr/>	<hr/>
	36,981	32,459
<b>Investment income</b>		
Deposit account interest	1,769	1,766
	<hr/>	<hr/>
<b>Total incoming resources</b>	40,331	35,660
<b>RESOURCES EXPENDED</b>		
<b>Costs of generating voluntary income</b>		
Subscription Services	5,025	4,924
Printing and Publishing	16,023	15,882
Conference Costs	11,386	6,992
Regional Works	1,433	1,110
Training	497	2,097
	<hr/>	<hr/>
	34,364	31,005
<b>Charitable activities</b>		
Travel and Subsistence	1,399	45
Stationary and Printing	391	29
Bank Charges	732	512
Carried forward	2,522	586

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 2012

	<b>31.12.12</b>	31.12.11
	£	£
<b>Charitable activities</b>		
Brought forward	2,522	586
Sundries	148	56
	<hr/>	<hr/>
	2,670	642
<b>Governance costs</b>		
Trustees' expenses	1,737	1,505
Accountancy	1,116	1,116
	<hr/>	<hr/>
	2,853	2,621
	<hr/>	<hr/>
<b>Total resources expended</b>	39,887	34,268
<b>Net income</b>	<hr/> <hr/> 444	<hr/> <hr/> 1,392

This page does not form part of the statutory financial statements