

REGISTERED CHARITY NUMBER: 0288805

**REPORT OF THE TRUSTEES AND
FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2021
FOR
THE ORAL HISTORY SOCIETY**

Prestons & Jacksons Partnership LLP
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THE ORAL HISTORY SOCIETY

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THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT

FOR THE YEAR ENDED 31 DECEMBER 2021

Next year the Oral History Society will be fifty years old which makes this report the final one before what will be a time for celebration and reflection as well as for looking forward. This anniversary will also coincide with the launch of our new strategic plan which we will begin to draft at our two-day away event in December 2022. One constant over our 49-year history has been the extraordinary efforts of our volunteers and once again their industry and achievements form the backbone of my report.

The global pandemic, despite popular beliefs to the contrary, continues to cause suffering and loss of life. This has presented public health and financial risks for the Society which we have sought to mitigate in a number of ways. We have observed safety protocols and continued to meet on Zoom and conduct other communications via our website, newsletter and groups.io. There are plans for one of our Special Interest Groups (SIGs) to meet in person and this year's annual conference 'Home' will be hybrid, allowing the option of both but with the necessary precautions in place.

Financially, the Society fared better than many organisations have during the pandemic. Costs associated with in person meetings were inevitably down, although the technical costs of running our 2021 annual conference online were significantly increased. Membership remained fairly stable which is both a reflection of the loyalty of members, as well as the opportunities provided to exchange ideas, access high-quality information advice and read about current research in the Journal. Financially we performed better than our forecasted loss of £9,000, ending the year with a small surplus of £324. However, we are aware that going forward, the costs of in-person meetings, alongside our commitment to support and enhance our digital communications, will inevitably feature in our strategic discussion in December. Moreover, the Society currently relies on extraordinary levels of voluntary effort and expertise, as my report testifies, placing mounting pressures and challenges on volunteers. To this end, we may need to add to our paid professional support which would obviously have financial implications for the Society that would need to be considered carefully at our strategy discussions in December, if not before.

Digital communications have been a priority for the OHS in keeping with the recommendations of our last strategic review in 2017 and the review of governance undertaken by a group of trustees and members across the Society. The pandemic has certainly accelerated some important developments that have facilitated more effective and varied channels of communication and sharing information which has facilitated more opportunities for members to express their views and influence the Society. These have been achieved through a major re-vamp of the website and the introduction of a number of tools and features, including an OHS blog, a regular multimedia article with the capacity to include audio-visual material and, in conjunction with the Oral History Journal, the introduction of online reviews and articles. The website's 4,000 or so hits per month is testimony to the wealth of updated information it now contains. For example, features on both archiving and remote interviewing have been added and have proved popular landing points. The numbers of newsletter subscribers and Facebook followers has remained stable this year, but our Twitter followers have continued to increase on average by 52 followers per month since 2019. Access to the website is currently free to both members and non-members and, whilst we will continue to support the wider oral history community, some consideration of the respective benefits to members and non-members will form an important part of our strategic discussion in December.

In addition to the new Journal features of the website, the Oral History Journal published two issues in spring and autumn 2021 with a wonderful range of articles from international settings. Like other groups in the Society, editors have continued to meet online and have also benefitted from international participation. On behalf of the Society, I would like to offer our sincere thanks to Cynthia Brown, who resigned as editor of the Current British Work section of the journal which has been a go-to section for keeping in touch with current projects.

THE ORAL HISTORY SOCIETY

CHAIRMAN'S REPORT FOR THE YEAR ENDED 31 DECEMBER 2021

The idea of Special Interest Groups (SIGs) were conceived at the strategy weekend in 2014 and are now a flourishing and integral feature of the Society's activities. The importance of creating a space for groups to emerge organically out of members' interests was highlighted again this year with the creation of a SIG in Archives and Oral History. The range of events run this year across all our SIGs give a flavour of their dynamism and vitality. These have included 'The Performing Oral History Symposium' (Creative Oral History), 'More than Weather' (Environment and Climate Change) 'Corridor Conversations' (Higher Education) and 'LGBTQ people in Ukraine and Russia, past and present' (LGBTQ).

The Regional Network provides another opportunity to hear from oral historians across the UK, spanning twelve regions with 34 representatives from museums, universities, community organisations and libraries, as well as freelance oral historians. I'd like to pay special tribute to Juliana Vandegrift who stood down as Coordinator of the Network after eleven years. In addition to its annual meeting, the Network has hosted a series of monthly (virtual) drop-in sessions, on various topics, including one on recording traumatic and distressing memories that originated in a post on groups.io and attracted considerable interest. Members wanting to learn more about the Network are encouraged to look at the website for more information, including an interactive map and some contact details.

In addition to information and advice offered via the website and groups.io, a formal programme of training in oral history is conducted in collaboration with National Life Stories and the British Library. This year the training groups have delivered 84 courses to 652 people. The vast majority of courses were delivered online, which had the advantage of attracting both a strong contingent of overseas participants and some from the UK who were unable to travel for different reasons. Apart from the general introductory courses, courses on archiving, transcript to script, palliative care, project management and an introduction to GDPR for oral historians all featured in this year's offering.

One of our most important roles as a learned society is to defend and support oral history and oral historians, particularly in organisations and departments that are threatened with closure and individuals with redundancy or where funding is at risk. The Society has made a number of written interventions with varying success. Whatever the outcome, it is important for the OHS to lobby through our networks and support those colleagues and members of the wider oral history community, both in the UK and overseas.

In the aftermath of the George Floyd murder, the Society, like many other organisations and bodies, has initiated discussions on diversity and inclusivity. This year we have given consideration to the advertising of trustee vacancies and to developing relationships with groups through a series of 'in dialogue' events. The first was with Southall Black Sisters and others are planned with The Black Cultural Archive and The George Padmore Institute. The intention to increase and diversify our membership will be a key theme in our strategic discussions in December.

I began my report with a reference to the efforts of our volunteers over what is almost half a century. In this respect, the Society will be awarding three long standing members of the OHS, Alan Dein, Graham Smith and Robert Wilkinson, with life memberships at this year's Annual General Meeting to be held during our annual conference. On behalf of the Society, I'd also like to thank Fiona Cosson and Kate Melvin who resigned this year as Trustees after many years of service.

THE ORAL HISTORY SOCIETY
CHAIRMAN'S REPORT
FOR THE YEAR ENDED 31 DECEMBER 2021

I have not attempted to name all those individuals responsible for the Society's extraordinary range of initiatives and activities this year. However, to all my fellow officers, trustees, regional networkers and SIG members, as well as to those responsible for membership, finance, appointments and training, and to all those members who have maintained their loyalty to the organisation during difficult times, I offer an enormous thank you! I look forward to joining you in our 50th birthday celebrations next year.

John Gabriel, Chair

THE ORAL HISTORY SOCIETY
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2021

The trustees present their report with the financial statements of the charity for the year ended 31 December 2021. 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 2019).

OBJECTIVES AND ACTIVITIES

Objectives and aims

The Oral History Society (OHS), founded in 1973, is a national charity dedicated to the collection and preservation of oral history. It aims to offer both encouragement and practical advice to those conducting oral history, through its training courses run in conjunction with the British Library National Sound Archive, a yearly conference, and the twice-yearly publication of its journal Oral History. From the first edition Oral History has also provided a forum for oral historians to discuss the methods and challenges involved in the collection, interpretation and dissemination of oral testimonies. The journal has long maintained a news section that includes reports from community projects as well as a reviews section. This reflects the Society's policy of representing oral historians no matter where they work whether it is in education, community organisations or the media.

Activities

Current activities include jointly running a training programme with National Life Stories at the British Library, supporting over 40 experienced oral historians as locally based Regional Networkers - a point of contact for anyone interested in oral history; offering technical, legal and ethical advice; providing information on the funding of oral history work; and publishing two editions of the journal Oral History each year. Members also receive a free e-newsletter several times a year with briefings and news items.

Additional objectives and activities

A key structure of the Society is the Regional Network consisting of oral historians who offer a first point of contact in localities throughout Britain and Northern Ireland. The Trustees' sub-committees reflect priority areas and include a Nominations Committee, Trainers Group and an Archives Sub-Committee. The journal has its own Editorial Committee. There are a number of Special Interest Groups which are a recent innovation of the Society, in response to increasing interest among members for ways to develop networks and facilitate discussion and activities with others who share common interests and concerns.

There are currently the following Special Interest Groups:

- Schools and Young People
- Higher Education
- Environment and Climate Change
- Migration
- Psycho-Social Therapies and Care Environments
- Lesbian, Gay Bisexual, Transgender and Queer (LBGTQ)
- The Creative SIG

Public benefit

The Trustees confirm that they have complied with the duty in section 4 of the Charities Act 2011 to have due regard to public benefit guidance published by the Commission in determining the activities undertaken by the Charity.

THE ORAL HISTORY SOCIETY
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2021

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 £49,247 (prior year £41,320) and outgoing resources of £48,923 (prior year £36,368), making a net overall surplus of £324 (prior year £4,952). Free unrestricted reserves amounted to £96,082 (prior year £95,758).

Reserves policy

It was agreed that unrestricted financial reserves should be maintained at no less than half average expenses of the previous financial year. The trustees are confident the charity has sufficient unrestricted reserves.

FUTURE PLANS

The trustees review the aims, objectives and activities of the charity on a regular basis. They look at what the charity has achieved and the outcomes of its work in the reporting period. The trustees report on the success of each key activity. This can be seen on the Oral history web site www.ohs.ac.uk. The review also helps the trustees ensure the Society's aims and objectives and in planning its future activities. In particular the trustees consider how planned activities will contribute to the aims and objectives that have been set.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

The charity is controlled by its governing document, a deed of trust, and constitutes an unincorporated charity. Details can be seen on the OHS web site at www.ohs.ac.uk.

Trustee Selection

The Trustees meet four times a year. The Trustees are responsible for the governance of the Society and are elected at the Society's Annual General Meeting which is held at the Society's annual conference. Officers' positions of the Society include a Chair, Vice-Chair, Secretary and Treasurer who are also elected annually.

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. For more information visit the OHS web site at www.ohs.ac.uk

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity number

0288805

THE ORAL HISTORY SOCIETY
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31 DECEMBER 2021

Principal address

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

Trustees

Professor John Gabriel - **(Chair)**
Beth Thomas - **(Vice Chair)**
Dr Robert B Perks - **(Secretary)**
Titi Faluyi- (Treasurer)
Professor Joanna Bornat
Padmini Broomfield
Cynthia Brown
Verusca Calabria
Erin Farley
Dr Craig Fees
Emily Gibbs
Jenny Harding
Dr Cai Parry-Jones
Mary Stewart
Dr Amy Tooth-Murphy
Juliana Vandegrift
Dr Michelle Winslow
Dr Rob Perks
Dr Alan John Butler - Appointed on 10th July 2021
Mrs Jennifer Bethan Vickers - Appointed on 10th July 2021
Professor Malcolm Cowburn - Appointed on 10th July 2021

Independent Examiner

Anwer Patel BA (Hons), BFP, FCA
ICAEW
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 THE ORAL HISTORY SOCIETY

Independent examiner's report to the trustees of The Oral History Society

I report to the charity trustees on my examination of the accounts of The Oral History Society (the Trust) for the year ended 31 December 2021.

Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Trust's accounts carried out under section 145 of the Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

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

Date:

THE ORAL HISTORY SOCIETY

**STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2021**

	Notes	31.12.21 Unrestricted fund £	31.12.20 Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	2	2,239	2,465
Other trading activities	3	46,283	38,011
Investment income	4	725	844
Total		49,247	41,320
 EXPENDITURE ON			
Raising funds		40,288	26,433
Charitable activities			
General		8,635	9,935
Total		48,923	36,368
NET INCOME		324	4,952
 RECONCILIATION OF FUNDS			
Total funds brought forward		95,758	90,806
TOTAL FUNDS CARRIED FORWARD		96,082	95,758

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY
STATEMENT OF FINANCIAL POSITION
31 DECEMBER 2021

	Notes	31.12.21 Unrestricted fund £	31.12.20 Total funds £
CURRENT ASSETS			
Debtors	7	2,581	4,573
Cash at bank		<u>106,732</u>	<u>101,738</u>
		109,313	106,311
CREDITORS			
Amounts falling due within one year	8	<u>(13,231)</u>	<u>(10,553)</u>
NET CURRENT ASSETS		<u>96,082</u>	<u>95,758</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		96,082	95,758
NET ASSETS		<u><u>96,082</u></u>	<u><u>95,758</u></u>

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY

**STATEMENT OF FINANCIAL POSITION - continued
31 DECEMBER 2021**

FUNDS	9		
Unrestricted funds		<u>96,082</u>	<u>95,758</u>
TOTAL FUNDS		<u><u>96,082</u></u>	<u><u>95,758</u></u>

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

.....
Trustee

.....
Trustee

.....
Trustee

The notes form part of these financial statements

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2021

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 2019)', 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.

Going concern

Although COVID 19 is having a significant impact on the operations of the Society, the Trustees are confident that they have sufficient funds to cover for their charitable activities for the next twelve months. As a result of this, the accounts have been prepared on a going concern basis.

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.

Donations are recognised when the charity has been notified in writing of both the amount and settlement date. In the event that a donation is subject to conditions that require a level of performance before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those condition is wholly within the control of the charity and is probable that those conditions will be fulfilled in the reporting period.

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.

Irrecoverable VAT is charged as cost against the activity for which the expenditure was incurred.

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.

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 DECEMBER 2021

1. ACCOUNTING POLICIES - continued

Debtors

Basic financial assets, including trade and other debtors, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Such assets are subsequently carried at amortised cost using the effective interest method, less any impairment.

Creditors

Basic financial liabilities, including trade and other creditors, loans from third parties and loans from related parties, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Such instruments are subsequently carried at amortised cost using the effective interest method, less any impairment.

Related Party Note

The charity discloses related party transactions in the notes to the financial statements.

2. DONATIONS AND LEGACIES

	31.12.21	31.12.20
	£	£
Gift aid	2,239	2,465

3. OTHER TRADING ACTIVITIES

	31.12.21	31.12.20
	£	£
Income from Conferences	9,239	-
Subscription Income	30,389	31,966
Sundries	3,162	3,654
Advertising	261	72
Other Generating Funds	3,232	2,319
	<u>46,283</u>	<u>38,011</u>

THE ORAL HISTORY SOCIETY

NOTES TO THE FINANCIAL STATEMENTS - continued FOR THE YEAR ENDED 31 DECEMBER 2021

4. INVESTMENT INCOME

	31.12.21	31.12.20
	£	£
Deposit account interest	725	844
	<u>725</u>	<u>844</u>

5. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31 December 2021 nor for the year ended 31 December 2020.

Trustees' expenses

	31.12.21	31.12.20
	£	£
Trustees' expenses	1,056	1,493
	<u>1,056</u>	<u>1,493</u>

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

6. KEY MANAGEMENT PERSONNEL

The Trust considers its key management personnel comprise of the trustees.

7. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.12.21	31.12.20
	£	£
Trade debtors	1,814	4,295
Prepayments and accrued income	767	278
	<u>2,581</u>	<u>4,573</u>

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2021**

8. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	31.12.21	31.12.20
	£	£
Trade creditors	1,900	2,821
Other creditors	11,331	7,732
	<u>13,231</u>	<u>10,553</u>

9. MOVEMENT IN FUNDS

	At 1/1/21	Net movement in funds	At 31/12/21
	£	£	£
Unrestricted funds			
General fund	95,758	324	96,082
	<u>95,758</u>	<u>324</u>	<u>96,082</u>

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

	Incoming resources	Resources expended	Movement in funds
	£	£	£
Unrestricted funds			
General fund	49,247	(48,923)	324
	<u>49,247</u>	<u>(48,923)</u>	<u>324</u>

Comparatives for movement in funds

	At 1/1/20	Net movement in funds	At 31/12/20
	£	£	£
Unrestricted funds			
General fund	90,806	4,952	95,758
	<u>90,806</u>	<u>4,952</u>	<u>95,758</u>

THE ORAL HISTORY SOCIETY

**NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31 DECEMBER 2021**

9. MOVEMENT IN FUNDS - continued

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	41,320	(36,368)	4,952
	—————	—————	—————
TOTAL FUNDS	<u>41,320</u>	<u>(36,368)</u>	<u>4,952</u>

10. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 December 2021.

THE ORAL HISTORY SOCIETY

**DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2021**

	31.12.21 £	31.12.20 £
INCOME AND ENDOWMENTS		
Donations and legacies		
Gift aid	2,239	2,465
Other trading activities		
Income from Conferences	9,239	-
Subscription Income	30,389	31,966
Sundries	3,162	3,654
Advertising	261	72
Other Generating Funds	3,232	2,319
	46,283	38,011
Investment income		
Deposit account interest	725	844
	49,247	41,320
EXPENDITURE		
Raising donations and legacies		
Subscription Services	6,819	6,091
Printing and Publishing	17,972	17,116
Conference Costs	12,927	1,697
Training	-	58
Website	2,570	1,471
	40,288	26,433
Charitable activities		
Stationary and Printing	165	386
Bank Charges	473	470
Sundries	-	242
Administrator	567	1,166
Special Interest Group	-	425
Video Conferencing	288	168
	1,493	2,857

This page does not form part of the statutory financial statements

THE ORAL HISTORY SOCIETY

**DETAILED STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31 DECEMBER 2021**

	31.12.21	31.12.20
	£	£
Support costs		
Governance costs		
Trustees' expenses	1,056	1,493
Accountancy and legal fees	1,516	1,520
Bookkeeping	4,570	4,065
	<hr/>	<hr/>
	7,142	7,078
	<hr/>	<hr/>
Total resources expended	48,923	36,368
	<hr/>	<hr/>
Net income	324	4,952
	<hr/> <hr/>	<hr/> <hr/>

This page does not form part of the statutory financial statements