



Shropshire Family History Society

Trustees' Annual Report and Accounts

Year Ended 30 September 2025

Legal And Administrative Information

Charity Number 514014

Trustees and Executive Committee

Patron

Anna Turner JP HM Lord Lieutenant of Shropshire

Vice Presidents

Ann Kirby

Michael J Hulme

Dr David R Burton

Trustees

Chair: Karen Hunter

Secretary: David Morris

Treasurer: Lorna Emms

Dawn Blundell

Simon Davies

Loraine Hunt

Steve Jones

Graham Shenton

Bankers

Lloyds Bank PLC

Business Banking, BX1 1LT

Hampshire Trust Bank

55 Bishopsgate, London, EC2N 3AS

United Trust Bank

1 Ropemaker St, London, EC2Y 9AW

Contact details

c/o SFHS Secretary

48 Oakley St

Shrewsbury

SY3 7JY

e-mail: secretary@sfhs.org.uk

Website: www.sfhs.org.uk

Independent Examiner

Andrew Fairchild BA FCMA CGMA, Chartered Management Accountant

Chair's Report

The Trustees present their report and accounts or the year ended 30 September 2025

Structure, governance, and management

Shropshire Family History Society (SFHS) is registered with the Charity Commission (number 514014) and governed by a Constitution initially drawn up in 1979 and last amended in 2023. Registered charities are required to comply with statutory and Charity Commission Public Benefit requirements and we believe that our activities as outlined below meet this guidance.

The Executive Committee members are Trustees of the Charity with the responsibility to administer the affairs and funds of the Society. The Executive Committee members for the last year are as listed on the facing page.

Objectives

The objects of the Society as contained within the Constitution are:

- to promote the study of genealogy and history especially of Shropshire families and places;
- to educate the public therein through advice and instruction and for the public benefit;
- to encourage the preservation and transcription of relevant documents and records especially for the County of Shropshire.

Activities, Achievements and Performance

Membership of the Society stood at 955 as of 30 September 2025, with members from across the world.

The largest achievement for this year has been the successful launch of our new website at the end of June. This has been a major project which required significant time and effort over a couple of years from the small team who worked on its development and huge thanks are due to them. The new site has enabled us to make a wider range of resources available to our members, including the full back catalogue of our Journals, access to a number of data sets and the recordings of previous talks, where the speaker has given permission. It is now possible for people to join our Society via the website, and we are delighted to report that this has resulted in 55 new members joining us since the launch.

We have held two Talking Family History LIVE events during the year, in October and May, each offering a programme of talks and an opportunity for people to come together to share their common interest in all things family history related.

Our Journal continues to be published on a quarterly basis with copies being distributed to all members. Members continue to provide articles (although we could always do with more), sharing their stories of people and places with links to Shropshire, to help create an interesting and informative publication. We also provide a monthly Newsletter, issued via email, to keep our members up-to-date with news and events.

The topics offered via our programme of online talks have been wide ranging, informative, and stimulating, including Mourning Brooches, Apprenticeship Records, Ethical Dilemmas in Genealogy and Non-conformist Ancestors. We regularly have an attendance of above 70 people, with members joining us from across the world. Where permission is given we record these sessions and make them available to members via the website.

The Talking Family History and DNA Special Interest Group sessions have continued through the year, giving members the opportunity to share their interests and knowledge and make connections with each other.

We are pleased to have continued to operate our help desk at Shropshire Archives, staffed by volunteers from the Society although because of restricted opening of the Archives during 2025 we have only been able to do this one day a week. This help is available to all who visit the Archives and offers access to a wide range of paper-based and microfiche records, Internet resources and other computer-based records.

All our events and activities are made possible through the commitment of volunteers. To all who give of their time, skills and enthusiasm in many ways throughout the year to help the Society thrive – thank you.

Karen Hunter, Chair

Financial Review

The Society continued to use spreadsheets as opposed to an accounting package given the limited transactions.

Policy on reserves

The Trustees believe it necessary to maintain unrestricted funds for the following purposes:

- a) to cover obligations to pay future hire and storage fees of the Cross Houses Community Centre in the event of a fall in normal revenue income.
- b) to buy research material which may become available from time to time.
- c) to renew and to buy further equipment to assist research and education.
- d) to invest in website improvements and other technology to enable greater engagement with members.

The Trustees believe that the current level of funds is adequate for these purposes.

The Society's General Fund shows an excess for the year of £802 which, when carried to reserves leaves a balance to carry forward of £96,319.

The Society will keep the level of reserves retained to ensure it is sufficient to fulfil our future obligations. Although the Society's funds are healthy, membership of family history societies continues to fall. The Society will continue to look at investing its reserves to build up capital to replace any anticipated fall in membership income. The Committee and Trustees will continue to keep payments and receipts under review during the coming year.

The Trustees declare that they have approved the Trustees' report above.

Signed on behalf of the charity's trustees

Karen Hunter

Chair

Date: 4 November 2025

David Morris

Secretary

Date: 4 November 2025

Shropshire Family History Society
Revenue and Expenditure for the year ended 30 September 2025

	30/09/2024	30/09/2025	
Revenue	£	£	
Subscriptions	8,163	8,145	
Gift Aid	1,059	1,763	Gift Aid in period is for two claims (covering prior year and part of current one).
Interest on Bank and Investment Account	3,348	3,734	
FHF Quarter sessions	568	542	
Loss / Profit on Sales	231	148	
Donations	843	178	
Miscellaneous	123	90	
Total receipts	14,334	14,600	
Expenditure			
Journal Creation, Printing and Postage	6,474	4,146	
Depreciation	518	412	See Assets Sheet.
Room Hire	45	95	
Zoom fees	171	330	Changed to annual subscription with payment in advance.
Mailchimp fees	238	251	
Storage hire	550	600	
Subscriptions	458	386	
Website expenses	2,874	5,029	Includes WIX fees subscription with payment for 3 years in advance and cost of new website.
Postage, Printing and Stationery	76	94	
Lecture Fees & Expenses	800	827	
Insurance	238	238	
Travelling expenses	10	417	
Archive Costs	717	333	Only a few claim travel expenses for visiting the archives.
Equipment	0	40	
Miscellaneous	19	0	
Project funding	0	600	Contribution to Friends of the Red Church signage.
Total payments	13,188	13,798	
Surplus (deficit) for the year	1,146	802	

Shropshire Family History Society

Balance Sheet as at 30 September 2025

	30/09/2024	30/09/2025
Fixed Assets		
Per Schedule below	1,734	1,322
Current Assets		
Stock of Publications at Cost	255	255
Current account & cash	6,453	3,933
Bank Deposit Accounts		
Hampshire Trust Bank	15,630	16,438
Lloyds Deposit Account	16,772	16,922
United Trust Bank	54,673	57,449
	95,517	96,319
Less Current Liabilities		
Sundry creditors	0	0
	<u>95,517</u>	<u>96,319</u>
Funding		
Opening Balance	94,371	95,517
Change in year	1,146	802
	<u>95,517</u>	<u>96,319</u>

Fixed Assets movement

<u>2023/24</u>	<u>Additions</u>	<u>Depreciation</u>	<u>Loss on sale</u>	<u>2024/25</u>
1,734	0	412	0	1,322
1,734	0	412	0	1,322

Lorna Emms (Treasurer)
On behalf of Committee
Date: 4 November 2025

Notes to the Accounts

Year ended 30 September 2025

1. Accounting Policies

a. Basis of accounting

These accounts have been prepared on a Payments and Receipts basis in accordance with the Charity Commission guidance.

b. Tax reclaims on donations, gifts and subscriptions

Gift Aid is claimed when there is a valid declaration from the donor and is included in receipts when the claim is settled by HMRC. Any Gift Aid amount recovered is considered to be part of that donation, gift or subscription.

c. Stock

Stock is valued at the lower of cost and net realisable value.

d. Trustee expenses

During the year expenses totalling £1,773 (2023/24 £1,204) were paid to Trustees to reimburse them for administration costs e.g. postage, travel expenses, Zoom fees etc. incurred on behalf of the Charity.

e. Depreciation policy

Provision for depreciation of fixed assets held by the Society is made at rates calculated to spread the cost less residual value of each asset evenly over its expected useful life. The rates applied are as follows:

Current year purchase	10% if purchased between 01/10 & 31/03, 0% if purchased after 01/04.
General depreciation	20% of previous year's closing Net Book Value

Independent examiner's report on the unaudited financial statements of Shropshire Family History Society

I report to the Trustees on my examination of the accounts of Shropshire Family History Society ("the Trust") for the year ended 30 September 2025.

Responsibilities and Basis of Report

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 145 of the Charities Act 2011 ("the Act") and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the Act
- follow the procedures laid down in the general directions given by the Charity Commission (under section 145(5)(b) of the Act, and
- state whether particular matters have come to my attention.

Basis of Independent examiner's statement

My examination was carried out in accordance with general instructions 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 the 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 statement below.

Independent examiner's statement

In connection with my examination, no material matters have come to my attention which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts as 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.

Andrew Fairchild BA FCMA CGMA Chartered Management Accountant

Date: 16 November 2025