REGISTERED CHARITY NUMBER: 275891

Report of the Trustees and Unaudited Financial Statements for the Year Ended 31 December 2025 for Oxfordshire Family History Society

Chapman Robinson and Moore Limited
30 Bankside Court
Stationfields
Kidlington
Oxford
OX5 1JE

Oxfordshire Family History Society

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for the Year Ended 31 December 2025

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Oxfordshire Family History Society

Report of the Trustees
for the Year Ended 31 December 2025

The trustees present their report with the financial statements of the charity for the year ended 31 December 2025. 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) and with the Charities Act 2011.

OBJECTIVES AND ACTIVITIES

The objects of the charity are to advance public education in family history and genealogy primarily within the county of Oxfordshire; index, co-ordinate, publish and make accessible in the interests of genealogy any documents or records relating to the county; to promote the preservation of such documents or records; to encourage the study of genealogy; to assist educationally by lectures or otherwise in records research; and to co-operate with family history (and other) Societies with similar interests.

PUBLIC BENEFIT

The Society supports the preservation and accessibility of historical records, mainly through scanning and a searchable database, making these records more readily accessible by researchers and the public. The Society provides copies of its journal to select local libraries for the advancement of family history knowledge and also runs periodic training courses in family history research.
The Society uses its website and Facebook pages and holds regular online talks to promote family history within and beyond Oxfordshire. The Society provides a helpdesk at the Oxfordshire History Centre and several Oxfordshire libraries to help the public research their family history. OFHS holds an annual fair open to the public and also attends several other fairs throughout the year.
The Society operates a close partnership with the Oxfordshire History Centre (local archives) and is in regular communication with other key local and historical societies in the county. A regular liaison meeting with the History Centre and Libraries management team ensures that both bodies promote visits and make best use of available resources, whilst maximising customer engagement in historical research.

The Society can effectively demonstrate how its activities provide a public benefit, contributing to the advancement of education, community engagement, and the preservation of historical knowledge.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing document

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

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity number 275891

PRINCIPAL ADDRESS

c/o Oxfordshire History Centre
St. Luke's Church
Temple Rd, Cowley
Oxford
Oxfordshire
OX4 2HT

TRUSTEES

M Austen	Trustee
C Eldridge	Trustee
S Honoré	Trustee (Jan to June 2025)
K Poile	Trustee (Jan to June 2025) Trustee (reappointed 4 February 2026)
S Mattheus	Trustee (Jan to June 2025)
J Cramer	Trustee
A Ramon	Trustee (Jan to Oct 2025)
A Trueman	Trustee
A Jones	Trustee
K Wait	Trustee (Mar 2025 onwards)
C Whitehead	Trustee (Apr to Jun 2025)
A Wallis	Trustee (appointed 4 March 2026)

Trustees are recruited from the Society's membership and formally appointed at the Society's Annual General Meeting. There is no formal induction policy but new trustees are given support and training to enable them to undertake their work.

The Society's affairs are managed by the Board of Trustees which met on a monthly basis (2025) and from March 2026 meets on a bi-monthly basis to plan future activities and consider matters relating to membership and finance.

The charity is not formally part of a wider network and has no subsidiaries. It does co-operate with other organisations that have an interest in family and local history.

ANNUAL REVIEW

The Society has no employees in 2025 (2024: NIL) but relies on volunteers to assist in its work including the provision of advice via local libraries.

At the end of 2025 there were 1,577 members (2024: 1,539).

Online meetings were well attended and well received by our members. The meetings meant that the Society could reach members across the world. Some 20 talks were held during the year. Some Chatroom meetings were also held throughout the year.

Alongside these talks, three journals were published for members. Monthly email news updates were also sent out to members to keep them abreast of more immediate events.

The Society held its annual fair in 2025 at Cherwell School, Oxford.

Membership is open to all and the services provided by the Society benefit the public and its understanding of genealogy, family history and local Oxfordshire history. The Trustees have considered this public benefit in accordance with the Charity Commission's published guidance under the Charities Act 2011.

FINANCIAL REVIEW

There was a deficit of income over expenditure in 2025 of £58,946 (2024: deficit £11,378). Income from Membership continued in line with 2024; income from royalties was similar to 2024. Investment income has decreased due to lower capital following the development of Big Oxfordshire Names Database (BOND).

Income is now derived from four primary sources: membership subscriptions; sales of books, CDs and other research information; royalties from other organisations and investment income.

RESERVES POLICY

All of the funds held by the OFHS are unrestricted funds. The Society has reserves as at December 2025 of £262,732 (2024: £321,678). This funding is held to enable the Society to develop its activities and to undertake investment in research or improving support to the membership (e.g. improving the Society's website and undertake new projects to improve the availability and knowledge of the Society's records to all OFHS members). The reserves (currently £163,000 at end of 2025) are held in a Charities Aid Foundation (CAF) Fund with Flagstone Investments, as per previous years, with projected annual interest earnings for 2026 being £6,150 with approximately 20% of annual turnover maintained as working capital in low interest current and deposit accounts.

Having considered its reserves and future income prospects, the Trustees consider that the Society is a going concern and expect that it will be able to pay all its debts within the next 12 months.

RISKS

The Society reviews risks as part of its regular meetings and when considering new activities.

The Society is carrying adequate reserves to cope with most financial problems such as a short term reduction in membership numbers or less successful events.

The work of the Society could be disrupted by external events and, over a longer timescale, a shortage of Trustees to continue to lead the Society.

BANKERS
Barclays Bank UK PLC
Barclays
Leicester
LE87 2BB

INDEPENDENT EXAMINER
T.K. Hobbs, FCCA
Chapman Robinson and Moore Limited
30 Bankside Court
Stationfields
Kidlington
Oxford
OX5 1JE

Approved by order of the board of trustees on 12 May 2026 and signed on its behalf by:

CHARLES ELDRIDGE (Hon. Treasurer)
{name of trustee to be inserted}

Oxfordshire Family History Society
Independent examiner's report to the trustees of Oxfordshire Family History Society

I report to the charity trustees on my examination of the accounts of the Oxfordshire Family History Society ('the Trust') for the year ended 31 December 2025.

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 your attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

T.K. Hobbs FCCA
Chapman Robinson and Moore Limited
30 Bankside Court
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Kidlington
Oxford
OX5 1JE

12 May 2026

Oxfordshire Family History Society

Statement of Financial Activities
for the Year Ended 31 December 2025

	Notes	2025 £	2024 £
INCOME FROM			
Charitable activities - Membership fees		16,354	16,444
Donations, legacies and royalties		20,015	19,786
Other trading activities	2	5,197	8,491
Investment income	3	7,256	10,587
Total		48,822	55,309
EXPENDITURE ON			
Raising funds		1,722	3,429
Charitable activities		106,047	63,258
Total		107,768	66,687
NET INCOME / (EXPENDITURE)		-58,946	-11,378
RECONCILIATION OF FUNDS			
Total funds brought forward		321,678	333,055
TOTAL FUNDS CARRIED FORWARD		262,732	321,678

The notes form part of these financial statements

Oxfordshire Family History Society

Balance Sheet
At 31 December 2025

	Notes	31/12/2025 £	31/12/2024 £
INTANGIBLE FIXED ASSETS			
Online Database	5	92,639	131,457
CURRENT ASSETS			
Cash at bank	6	8,637	10,817
Flagstone Savings		163,000	181,083
Debtors	7	5,631	4,677
Stock	8	-	-
CURRENT ASSETS		177,268	196,577
CURRENT Liabilities			
Creditors falling due within one year	9	7,176	6,357
CURRENT LIABILITIES		7,176	6,357
TOTAL ASSETS LESS CURRENT LIABILITIES		170,092	321,678
NET ASSETS		170,092	321,678
FUNDS			
Unrestricted funds		262,732	321,678
TOTAL FUNDS		262,732	321,678

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

C Eldridge -Trustee

M Austen -Trustee

The notes form part of these financial statements

Notes to the Financial Statements
for the Year Ended 31 December 2025

1. ACCOUNTING POLICIES

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)' and with the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

a) 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. Any income received relating to the following year is carried forward.

b) 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 costs 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.

c) Taxation

The charity is exempt from tax on its charitable activities.

d) 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. The Society has no restricted funds.

e) Intangible fixed assets

The online database is capitalised at cost. The cost will be written off on a straight line basis once brought into use (September 2024) over 36 months.

f) Key Judgements and Assumptions

The Society has made judgements about the likelihood of members continuing to take out subscriptions, of continuing sale and ongoing income from royalties. It has estimated outstanding creditors and debtors based on the latest information available. It has formed a view about the adequacy of reserves in the context of planned committed expenditure.

2. OTHER FUNDRAISING ACTIVITIES

	2025	2024
	£	£
Fundraising events	160	240
Sales (publications, CD/fiche, searches)	5,037	8,251
	5,197	8,491

3. INVESTMENT INCOME

	2025	2024
	£	£
Deposit account interest	7,256	10,587

4. TRUSTEES' REMUNERATION AND BENEFITS

There were trustees' expenses of £2,409 paid for the year ended 31 December 2025 (2024: £2,578). These relate to travel expenses and miscellaneous costs incurred on behalf of the Society. Seven Trustees received payment in 2025 (Six in 2024).

5. INTANGIBLE FIXED ASSETS

	Other intangible assets
Cost	
At 1 January 2025	147,890
Additions	16,765
At 31 December 2025	164,655
Amortisation	
At 1 January 2025	16,432
Charge for year	55,584
At 31 December 2025	72,016
Net book value	
At 31 December 2024	131,457
At 31 December 2025	92,639

6. CASH AND CASH EQUIVALENTS

	2025	2024
	£	£
Cash in hand (Current and Deposit accounts)	8,637	10,817
Cash equivalents (Long-term savings accounts)	163,000	181,083
	171,637	191,900

7. DEBTORS

The Society receives income from other organisations in the form of sponsorship. The debtors shown reflect the amount due to be paid in respect of 2025 royalties.

	2024	2024
	£	£
Trade Debtors	4,509	4,677
Other Debtors	1,122	0
	5,631	4,677

8. STOCK

The Society holds a limited number of publications and CDs for resale. Book sales are declining with the introduction of digitised alternatives. CDs production costs, once the information has been prepared, are minimal and so the cost of CDs is minimal. Since 2024, it was concluded to only provide downloads with no further production of CDs. For these reasons the Society has taken a prudent view to value its stock as nil (2024:Nil).

9. CREDITORS

Creditors at the year end relate to royalty payments owing and membership fees relating to 2026 paid before the year end.

	2025	2024
	£	£
Trade Creditors	3,731	3,727
Other Creditors	3,444	2,630
	7,176	6,357

10. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31 December 2025, apart from the expenses paid to trustees as disclosed in note 4.

The Society is a Public Benefit Entity.