

**THE FAMILY HISTORY SOCIETY OF CHESHIRE**  
**ACCOUNTS FOR THE**  
**YEAR ENDED 30TH JUNE 2025**

**BRIGHT PARTNERSHIP LIMITED**  
**CHARTERED ACCOUNTANTS**

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THE FAMILY HISTORY SOCIETY OF CHESHIRE  
(Charity no. 515168)

Trustees' Annual Report to the Charity Commission for the Year 2024-2025

**OBJECTS**

The object of the charity is to advance the education of the public in the study of family history in all its many aspects.

**GOVERNING DOCUMENT**

The charity is an unincorporated association governed by its constitution, originally set up around 1969 and currently the "1999 Constitution as amended 20<sup>th</sup> October 2001, 30<sup>th</sup> October 2021 and 20<sup>th</sup> July 2024".

**CONTROL**

Following a major review of the Society's operations and management structures carried out during 2024, a new revised Constitution was approved at an Extraordinary General Meeting held on 20<sup>th</sup> July 2024 and implemented with effect from 1<sup>st</sup> September 2024, at which point it was also submitted to the Charity Commission. This revised Constitution included considerable changes to the Management of the Society, which is now vested in ten trustees elected at the AGM, namely:

(a) Five Officers

Chair

Honorary Secretary

Honorary Treasurer

Two other Officers (currently designated as a Communications Officer and a Membership Services Officer)

and

(b) Five Elected Trustees

All trustees are unpaid.

The five Officers have responsibility for the oversight of day-to-day operations of specific functions and meet as a Management Committee. The Management Committee reports to a Board of Trustees consisting of all ten trustees.

**TRUSTEES**

The Chair for the reporting period 2024-2025 was Margaret Lillian Roberts of 4 Dunns Cottages, Butterton Lane, Oakhanger, Cheshire CW1 5UU.

The charity's principal address is that of the Mobberley Research Centre, Rajar Building, Town Lane, Mobberley, WA16 7ER.

A list of the trustees in place for 2024-25 is attached. It contains names of those who held that position during the financial year.

A training session for all trustees was held in December 2024, delivered by the Company

Secretary of the Federation of Family History Societies and including a review of the responsibilities of the trustees under the Trustee Act 2000, Charities Act 2011 and Equality Act 2010.

#### PLANNING

The bulk of the Society's activities are planned in advance. However, some aspects of the society's activities are necessarily opportunistic rather than susceptible to considered planning. For example, library acquisitions depend on available funds and suitable works and collections coming up for sale or storage in an archive.

#### ADVISERS

The society is a member of the Federation of Family History Societies (FFHS). Membership brings with it advice on matters relevant to the conduct of the society's affairs, either from FFHS staff or from their legal advisers or insurers. The Society contracts out some accounting functions and this may include an element of advice. Advice is sometimes sought from members of the society who have suitable expertise.

#### RISK

There appear to be no major risks to which the Society is exposed that are not covered by the insurance arranged through the FFHS. Assets insurance is provided by Aviva Insurance. The trustees commissioned an independent Financial Controls and Governance Review during the 2024-25 financial year. This identified a number of risks relating to the operation of separate bank accounts by the Society's local groups and the trustees are taking steps to close these accounts, bringing the funds into the Society's main accounts by the end of the 2025-26 financial year.

#### DATA PROTECTION

The Society is committed to complying with all relevant data protection legislation.

#### INDEPENDENT EXAMINER

The constitution calls for an independent examiner or auditor to be appointed. The independent examiner for the period was the Bright Partnership, Suite 1, Armcon Business Park, London Road South, Poynton, Cheshire, SK12 1LQ

#### ACCOUNTS

The accounts are presented on an accruals basis. The central accounts have been consolidated with the accounts of the 10 local groups operating in the 2024-25 financial year to generate the annual financial report. The Society is not registered for VAT, but is registered for VATMOSS in the Republic of Ireland for digital sales in the EU. The Financial Controls and Governance Review recommended moving from an accruals basis to a receipts and payment basis and this is being put in place for the 2025-26 financial year. In 2022-23, the trustees noted that there had been no review of the methodology used for depreciation of the value of tangible fixed assets for some time and this was addressed during 2023-24 and 2024-25, resulting in a considerable down-valuation of assets with a substantial amount being written off in each year.

#### RESERVES

The total monetary assets (Net Current Assets) in the consolidated accounts are shown as: £149,847.

The former executive committee determined (report, December 1999) that the reserves within its central accounts should be targeted at between one third and two thirds of its annual subscription. These reserves consist of: working capital; funds for the purchase of research materials; equipment; renewal provision, and provision for unforeseen expenditure. For the

year ending 30<sup>th</sup> June 2025 the annual subscription income was £19,400. Reserves are currently in excess of target. The trustees are satisfied that the reserves policy is appropriate and the level of reserves this year is suitable for the prevailing circumstances. A review of the reserves policy was planned for 2023-2024 but was subsequently deferred in view of the broader review of the Society's management and pending changes to the financial operations of the Society which commenced in 2024-25 and will be completed by the end of the 2025-26 financial year.

#### **PUBLIC BENEFIT REPORTING REQUIREMENT**

The next section charts the activities of the Society during the reporting year. This has been prepared with regard to the guidance in the Charity Commission's brochure PB1 "Charities and Public Benefit" published in September 2013.

#### **ACTIVITIES, ACHIEVEMENTS and PUBLIC BENEFIT 2024-25**

During the reporting year 2024-25, the Society carried out a wide range of activities, including the operation of its family history research centres at Mobberley and Crewe and local group meetings. Additionally, the Cheshire Family History Seminar Series of on-line talks and presentations by nationally known figures, which commenced in the autumn of 2021 with monthly meetings, has continued to be well-attended and widely praised for its accessibility to members from outside Cheshire, including overseas members. There is a full programme for 2025-2026, enhanced by additional online Cheshire Research Seminar Buddies allowing interaction between members both in and outside Cheshire with similar interests in geographical areas of the county and by new online Discussion Groups. The Society's Board of Trustee meetings were held online facilitating attendance by the trustees, regardless of their location. Attendance at the 2025 Annual General Meeting also showed continuation of the trend for greater engagement by members now that its business, preceded by a talk given by a nationally known speaker, is held online.

#### **Membership**

A substantial percentage of the members now join via the internet and this facilitates our ability to address a geographically wide public. A gradual decline in membership over recent years is a matter of concern to the Society and the Society's outreach activities to the general public and is being addressed through the new management arrangements including the appointment of an additional officer to act as Membership Services Officer. Renewals in 2025 continued to reflect that decline although many members continue to express their appreciation of the new opportunities provided by online meetings which have developed since the pandemic. Given the circumstances, membership numbers have held up well, supported by significant improvements in recent years in the arrangements for new members. The Society is looking to increase its presence at heritage and family history events in 2025-26, both to further its objects under its Constitution but also to attract potential new members.

#### **Mobberley Research Centre**

The Mobberley Research Centre is at The Rajar Building, Town Lane, Mobberley, WA16 7ER. These premises provide light and bright accommodation and space for the Society's extensive collection of documents and computer resources.

The Rajar Building is owned by Mobberley Parish Council and was the subject of refurbishment with the aid of an S106 agreement following planning permission for new homes in the village. The Research Centre is staffed by volunteers and is overseen by a Management Committee. The Centre is the focus of our service provision, providing an invaluable resource for the Society in general and for members at the eastern side of the county in particular. It is open to non-members for a small donation. The multifunctional machines that handle media and copying continue to reinforce their value to the society and to make the wide range of

resources available for research. The Centre continues to respond to the increase in on-line genealogical information although *Find My Past*, *Ancestry* and *The Genealogist* websites, remain the preferred and cost-effective sites accessed by subscription, together with access to the many free to search sites. Attendance at the Research Centre has substantially decreased since the pandemic and, as a consequence and in view of the reduced availability of volunteers, the Research Centre has reduced its opening times from three days to two days a week.

### **Crewe Family History Unit**

Previously based in the Crewe Municipal Building, the Unit relocated in 2025 to rooms provided by Cheshire East Council in its Brierley Business Centre. It holds a good cross section of research material including free access to the same websites as the Mobberley Research Centre, local parish registers, an extensive library and the Crewe Collection. The Unit is run by volunteers and opens two days a week and on occasional Saturdays. The Unit also has a space for talks and displays.

The Society continues to be heavily involved in collaboration with Cheshire Archives and Local Studies (CALs) in the development of plans for the new Crewe history centre and it is anticipated that the Family History Unit will in due course relocate into the new centre. Discussions with CALs are also ongoing with regard to the options open to the Society to be involved in the similar developments for the new Chester history centre. The trustees are aware that the costs of operating the Mobberley Research Centres account for a large part of the Society's annual expenditure and that this requires careful consideration in relation to any future developments which the Society may enter into with CALs.

### **Internet presence**

The Society's website continues to provide an invaluable line of communication to members. There is a monthly newsletter, sent out to all members for whom it has an email address. This gives information, news and hints, advising members of upcoming events in the family history world and links to useful websites. The Society's presence on Facebook and BlueSky has been enhanced and consolidated proving a valuable resource for members and non-members alike. All these areas of online activity are constantly reviewed and updated to ensure that the best information and encouragement is given. A new Social Media Policy was approved by the trustees in 2025.

The Society's website itself is reviewed constantly to allow improvement and updates following feedback from users and, in particular, feedback gained from the membership survey conducted in December 2023. It is accessed by members and non-members alike. The Webmaster and his Web Assistant have ensured that members are fully cognisant of the opportunities the site offers. All group leaders can manage their own web presence in a time efficient way providing members with information about group activities and other local events and projects. Such activities, and the broader opportunities now available, enhance membership of the Society. Easily accessible information available on line for the general public raises the Society's profile and encourages new members to join and to pursue the study of family history. An active online Forum allows members and non-members to raise issues and problems they are facing in their research and to discuss possible solutions with other users. New members can thus benefit from the experience of others. The Members' only section of the site gives them access to documentation relevant to the society's activities. After an extensive, and ongoing, digitisation of its resources the Society's online shop offers a wide range of digitised resources for download and CDs for which it owns the copyright and other items of interest to family historians. The website also has links to other relevant family history sites where members and the general public can pursue their research. All of this benefits the society's members and researchers worldwide.

The Society also hosts and manages the website for the North West Group of Family History Societies.

### **Electronic projects**

Electronic records of Cheshire related material are produced from the projects undertaken by our groups, volunteers, members and others. Microfiche and CD/DVD resources are being replaced as more of the Society's resources are digitised for download through the online shop and for placement on commercial family history sites.

### **Local Groups**

The Society's local groups provide a focus for people in specific localities in Cheshire. A popular and important part of our work is undertaken by these groups, with group committee members providing local knowledge, organising talks (either face-to-face, online or a mixture of the two), undertaking the collection of data and making this available worldwide, and helping members and the public with their research at local help desks in libraries and other community facilities. In the 2024-2025, reporting year the Society had 10 Local Groups operating across the historic County of Cheshire. Sadly, a lack of volunteers to run its Tameside group led to the group's closure in August 2025 although a monthly helpdesk is still offered at the Tameside Local Studies and Archives Library, together with a weekly helpdesk at Wallasey Central Library. These helpdesks are open to both members and non-members.

### **The Computer Club**

The Computer Club plays an important role in providing advice on all aspects of the digital world, holding regular meetings to address current issues and problems and to look at new initiatives and sources of information relevant to family historians.

The Computer Club pioneered the use of online meetings discovering that more people attended than did a physical meeting and that members from all over the country, and elsewhere in the world, were willing and able to interact with the Society. Online working has also enabled small groups with particular interests to be formed which can then feed back to the Club and the Society; these have recently been opened up more widely to members of the Society, together with a monthly online chat session.

### **Journal**

The society's journal, the *Cheshire Ancestor*, remains a focus of communication with our members. It is produced quarterly and continues to be both entertaining and a mine of useful information. As a result of increased publishing and postage costs members have the opportunity of receiving an electronic version of the journal at a lower subscription rate but a significant number of members prefer to continue to receive the journal in paper format. The journal is distributed to the major libraries, archive offices and local studies libraries throughout the historic county of Cheshire covering the following modern local authority areas: Cheshire East, Cheshire West and Chester, Wirral, Halton, Stockport, Trafford and Tameside. It is hoped that this will raise the Society's profile and attract members from those who are using these resource centres at the beginning of their family history journey.

### **Transcription, indexing and publications**

Reduction in membership numbers and the closure of a number of the local groups in recent years has affected the availability of members to participate in projects for the transcription and/or indexing of all sorts of written historical records and also of gravestones, war memorials and other relevant data. Where these projects have been feasible, this has benefited all those in this country and overseas who have Cheshire ancestry. The publication of these results online as downloads through the Society's online shop, in book form, or as CDs enables access for those who are unable to visit local Cheshire facilities through disability or distance. This is a public service that most or all family history societies, and other historical

organisations, undertake. It is anticipated that there will be greater scope to resume more of this project work once the new CALS history centres have opened.

### **Lectures**

The Society is always ready to provide speakers to educate the public at formal education establishments or at meetings of other organisations, including those that do not have a historical focus. Our own meetings often include speakers on wider aspects of social, local, national and international history that put family history in context. These local group meetings are advertised locally and non-members are invited to attend. The Society is planning on holding a number of one-off Family History events during 2026 in association with other Cheshire-based organisations and is looking into the development of online family history classes.

### **Co-operation with others**

The society is a member of the Federation of Family History Societies and of the North West Group of Family History Societies and liaises with other family history societies, local Registrars, local studies officers and the media. There is good co-operation with the Cheshire Archives and Local Studies (CALS) and the Society continues to be actively engaged in the ongoing consultation on the future of the archive service within Cheshire and the role that the Society can have in these future developments. A Memorandum of Understanding was agreed with both the Cheshire Local Authorities as part of the bid for Heritage Lottery Funding for the Archives Project. The Society also works with the Wirral Archives Services, is a member of the Cheshire Local History Association and the Lancashire Parish Registers Society.

### **Volunteer Activities**

The Society can only function through the work of its volunteers. A survey undertaken in the 2017-2018 reporting year indicated over 20,000 hours contributed by volunteers, equivalent to around 12 full time staff and over £150,000 at the national minimum wage. The trustees would wish to acknowledge the debt that is owed to all those who give willingly of their time to further the objectives of the Society and for the benefit of the public.

### **ATTACHMENTS**

List of trustees during the financial year ending 30<sup>th</sup> June 2025.

### **DECLARATION**

Signed with the authority of the trustees,

A rectangular box containing a handwritten signature in dark ink. The signature appears to be 'M Roberts'.

Margaret Roberts  
Chair

**FHSC Trustee List**

Those who occupied a position as Trustee of the Family History Society of Cheshire for the Reporting Year 1<sup>st</sup> July 2024 to 30<sup>th</sup> June 2025:

BROWN, Robert

DAVENPORT Peter,

DEAN, Kevin

GUYTON David,

JOHNSON Geoff,

JONES, Sheila

ROBERTS, Margaret,

SPATE Margaret,

TURLEY, Alan

WORTHINGTON, Ian

**THE FAMILY HISTORY SOCIETY OF CHESHIRE**

**INDEPENDENT EXAMINER'S REPORT TO THE MANAGING COMMITTEE**

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We report on the accounts of The Family History Society of Cheshire for the year ended 30th June 2025.

**Respective responsibilities of the Managing Committee and Examiner**

As the association's Managing Committee, you are responsible for the preparation of the accounts; you consider that an audit is not required under section 144(2) of the Charities Act 2011 and that an independent examination is needed.

It is our responsibility to:

- \* examine the accounts under section 145 of the 2011 Act;
- \* follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- \* state whether particular matters have come to my attention.

**Basis of Independent Examiner's Report**

Our 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 Association 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 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 our examination, no matter has come to our attention:

- (1) which gives us 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 comply with the accounting requirements of the 2011 Acthave not been met; or
- (2) to which, in our opinion, attention should have been drawn in order to enable a proper understanding of the accounts to be reached.



**Bright Partnership Limited**  
**Chartered Accountants**

**Suite 1, Armcon Business Park**  
**London Road South**  
**Poynton**  
**Cheshire**  
**SK12 1LQ**

**13th November 2025**

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**THE FAMILY HISTORY SOCIETY OF CHESHIRE**

**ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2025**

**STATEMENT OF INCOME & EXPENDITURE**

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	<b>2025</b>	<b>2024</b>
	<b>£</b>	<b>£</b>
<b>INCOME</b>		
Subscriptions	19,400	22,538
Interest on deposits	3,882	3,719
Book sales	133	26
CD sales	65	89
Advertising	-	-
Research rooms - Mobberley	664	1,300
Royalties	466	678
Website income	809	1,620
Donations	30	795
Funds from closed groups	5,204	-
<b>Total income for year</b>	<u>30,653</u>	<u>30,765</u>
<b>EXPENDITURE</b>		
Magazine printing	3,311	4,200
Magazine postage	3,872	4,338
Capitation to groups	-	5,500
Grants to groups	-	-
Royalties to groups	-	-
Insurance & FFHS subscription	867	1,373
Subscriptions	433	262
Book purchases for resale	150	250
CD purchases for resale	225	335
Membership expenses	1,677	1,552
Research rooms - Mobberley	9,338	9,837
Crewe research centre	82	245
Website expenses	2,387	2,174
Committee costs	110	135
Accountancy charges	3,215	5,020
Other expenditure	694	639
Depreciation	4,591	4,563
<b>Total expenditure for the year</b>	<u>30,952</u>	<u>40,423</u>
<b>Deficit</b>	(299)	(9,658)
<b>Exceptional item</b>		
Historical asset write off	(30,000)	-
	<u>(30,299)</u>	<u>(9,658)</u>

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**THE FAMILY HISTORY SOCIETY OF CHESHIRE**

**ANNUAL ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2025**

**BALANCE SHEET**

	2025 £	2025 £	2024 £	2024 £
<b>Tangible Fixed Assets</b>				
Equipment at net book value	205		230	
Additions during year	489		230	
	<u>694</u>		<u>230</u>	
Less: Depreciation for year	<u>(53)</u>		<u>(25)</u>	
		641		205
Furniture & other equipment at net book value		-		-
Microfiche library at net book value		-		-
Mobberley leasehold improvements at net book value		-		-
Library Books at net book value	40,850		45,388	
Less: Depreciation for year	(4,538)		(4,538)	
Historical asset value written off	<u>(30,000)</u>		<u>-</u>	
		<u>6,312</u>		<u>40,850</u>
		6,953		41,055
<b>Current Assets</b>				
Stock	200		575	
Sundry debtors	1,575		1,637	
Prepayments	3,124		3,178	
Cash at bank	111,686		107,473	
	<u>116,585</u>		<u>112,863</u>	
<b>Current Liabilities</b>				
Subscriptions received in advance	4,825		4,989	
Other creditors and accruals	<u>2,065</u>		<u>1,982</u>	
	6,890		6,971	
<b>Net Current Assets</b>		109,695		105,892
<b>TOTAL ASSETS</b>		<u>116,648</u>		<u>146,947</u>
Financed by:				
<b>Society Funds</b>				
Balance at 1st July 2024		146,947		156,605
(Deficit)/Surplus for year		<u>(30,299)</u>		<u>(9,658)</u>
		<u>116,648</u>		<u>146,947</u>

THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2025

STATEMENT OF INCOME & EXPENDITURE

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	2025	2024
	£	£
<b>INCOME</b>		
Subscriptions	19,400	22,538
Interest on deposits	3,998	3,822
Book sales	350	326
CD sales	65	89
Advertising	-	-
Research rooms - Mobberley	665	1,300
Royalties	466	678
Donations	465	1,236
Other income	580	547
Door money	3,077	3,635
Website income	809	1,620
<b>Total income for year</b>	<u>29,875</u>	<u>35,791</u>
<b>EXPENDITURE</b>		
Magazine printing	3,311	4,200
Magazine postage	3,872	4,338
Insurance & FFHS subscription	867	1,373
Subscriptions	433	262
Book purchases for resale	150	250
CD purchases for resale	225	335
Membership expenses	1,677	1,552
Research rooms - Mobberley	9,338	9,837
Crewe research centre	82	245
Website expenses	2,387	2,174
Committee costs	110	135
Room hire	2,165	2,895
Accountancy charges	3,215	5,020
Library expenses	277	23
Other expenditure	2,880	2,233
Speakers	2,159	2,909
Refreshments	665	711
Donations and gratuities	1,250	20
Depreciation	4,591	5,338
<b>Total Expenditure for the year</b>	<u>39,654</u>	<u>43,850</u>
<b>(Deficit)/Surplus</b>	(9,779)	(8,059)
<b>Exceptional item</b>		
Historical asset write off	(32,920)	(48,886)
	<u>(42,699)</u>	<u>(56,945)</u>

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THE FAMILY HISTORY SOCIETY OF CHESHIRE

CONSOLIDATED ACCOUNTS FOR THE YEAR ENDED 30TH JUNE 2025

BALANCE SHEET

	2025 £	2025 £	2024 £	2024 £
<b>Tangible Fixed Assets</b>				
Equipment at Net Book Value	1,200		28,757	
Additions during year	489		500	
	<u>1,689</u>		<u>29,257</u>	
Less: Depreciation for year	(53)		(530)	
Historical Asset Value written off	<u>(995)</u>		<u>(27,527)</u>	
		641		1,200
Furniture & Other Equipment at Net Book Value	435		4,298	
Less: Depreciation for year	-		(200)	
Historical Asset Value written off	<u>(435)</u>		<u>(3,663)</u>	
		-		435
Microfiche Library at Net Book Value		-		-
Mobberley Leasehold Improvements at Net Book Value		-		-
Library Books at Cost at Net Book Value	42,340		64,644	
Less: Depreciation for year	(4,538)		(4,608)	
Historical Asset Value written off	<u>(31,490)</u>		<u>(17,696)</u>	
		6,312		42,340
		<u>6,953</u>		<u>43,975</u>
<b>Current Assets</b>				
Stock	200		575	
Sundry Debtor	1,575		1,637	
Prepayments	3,124		3,178	
Cash at Bank	150,724		156,277	
Cash in Hand	1,114		828	
	<u>156,737</u>		<u>162,495</u>	
<b>Current Liabilities</b>				
Subscriptions Received in Advance	4,825		4,989	
Accruals	2,065		1,982	
	<u>6,890</u>		<u>6,971</u>	
<b>Net Current Assets</b>		149,847		155,524
<b>TOTAL ASSETS</b>		<u>156,800</u>		<u>199,499</u>
Financed by:				
<b>Group Funds</b>				
Balance at 1st July 2024	199,499		256,444	
(Deficit)/Surplus for year	<u>(42,699)</u>		<u>(56,945)</u>	
		156,800		199,499
		<u>156,800</u>		<u>199,499</u>