

WEST SURREY FAMILY HISTORY SOCIETY – APPLICATION FOR FINANCIAL ASSISTANCE

Executive Summary

West Surrey Family History Society was formed in 1974 and has been holding an annual Family History Fair in Woking. At the Fair, there are talks provided and stallholders who offer information on general research and specific topics such as the Armed Forces, old photographs, old handwriting and DNA. The Group has around 650 users in total, of whom 75 are based in Woking. The Fair due to be held in November 2020 was cancelled due to Covid-19.

The Fairs have previously been funded from general annual income, with a small amount charged to other stallholders. All visitors can attend free of charge. During the last few years the costs incurred have increased and the Group has been relying on its reserves to meet a shortfall, and notes that it would like to seek external funding to help cover the full cost. In 2021 there is a projected deficit of £1,500 against a bank balance of circa £25,000, equating to almost two years' annual expenditure.

The Society is applying for a grant of £2,000 towards the Fair to be held in November 2021 at Woking Leisure Centre. It is noted that the event is well attended and organised, with the chance for visitors to seek knowledge from the experience of stallholder and experts on hand to provide advice. However, in light of the ongoing constraints on the grants budget it is considered that funding should not be awarded to support the Fair. It is further noted that the Group does not currently have an Equalities or Safeguarding Policy.

Recommendations

The Executive is requested to:

RESOLVE That no grant be awarded.

Reason for Decision

It is not felt that the applicant has made sufficient justification for an award from the Community Grant Scheme.

The Executive has authority to determine the above recommendations.

Background Papers:

2021/22 Application Form.

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1.0 Summary of Application	
1.1 Status and Aims	<p>West Surrey Family History Society was founded in 1974. It has the vision of ‘taking the past into the future’ and the following objective:</p> <p>“To collect, index, co-ordinate, publish and make accessible in the interests of genealogy any documents or records, with particular reference to documents or records relating to the ancient County of Surrey; to promote the preservation of such documents and records; to encourage the study of genealogy; to assist educationally by lectures or otherwise in record research.”</p>
1.2 Employees	None.
1.3 Volunteers	<p>Approximately 100, whose activities include:</p> <ul style="list-style-type: none"> • Organising monthly meetings for the four Centres including booking speakers, publicity, welcoming guests and providing refreshments. • Writing articles, producing and editing the quarterly magazine "Root & Branch". • Organising the annual Family History Fair at Woking Leisure Centre including inviting organisations to attend, booking speakers, liaising with the Leisure Centre regarding hall layout and facilities, producing a floorplan and organising volunteers on the day. • Indexing numerous records about Surrey and producing the Society’s publications. • Taking the Bookstall to other family history events mainly in the south east of the country but sometimes further afield such as Dorset, Wiltshire and Birmingham. • Looking after the website and Facebook and Twitter pages. • Providing help, assistance and advice to members with their research. • Carrying out general administration.
1.4 Clients/Users	<p>650, comprising:</p> <p>75 resident in Woking</p> <p>175 aged 19-65</p> <p>475 aged 65+</p> <p>The following charges are levied:</p> <p>Ordinary membership - £12 per annum</p> <p>Senior citizen - £13 per annum</p> <p>Joint membership - £13 per annum</p> <p>Overseas membership - £16 per annum</p> <p>No charges (other than membership fees) are made to the Group users, other than postal charges for loan of books from the reference library.</p>

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1.5 Members	<p>650, comprising:</p> <p>75 resident in Woking</p> <p>175 aged 19-65</p> <p>475 aged 65+</p> <p>The following charges are levied:</p> <p>Ordinary membership - £12 per annum</p> <p>Senior citizen - £13 per annum</p> <p>Joint membership - £13 per annum</p> <p>Overseas membership - £16 per annum</p>
1.6 Sum Requested	£2,000 (Revenue)
1.7 Project	The funding would contribute to the overall cost of the Family History Fair in November 2021 and therefore enable the annual tradition to be continued.
1.8 Cost breakdown:	<p>Hall and studio hire - £1,400</p> <p>Staffing at Woking Leisure Centre - £200</p> <p>Table hire - £450</p> <p>Power drop for stallholders - £300</p> <p>Sundry expenses - £100</p> <p>Total - £2,450</p>
1.9 Community Benefit	Around 400 to 500 people would be able to access help and assistance with research from experts on the various Help Desks at the Fair, listen to specialist talks on historical research topics, access the Society's indexes and reference library and receive help and advice from other stallholders.
1.10 Covid-19 Impact	The annual Fair due to take place on 7 November 2020 at Woking Leisure Centre has been cancelled, alongside all the Group's other events and monthly meetings from March to December 2020. This has reduced the income from sales of publications. Two Zoom talks are being arranged each month for the Group's members.

2.0 Financial Background

2.1 Budget	<p>At the time of the application, the Group held £25,000 in the bank. The Group aims to set aside the sum of £10,000 for expenditure in organising its Fairs and costs such as printings its quarterly magazines.</p> <p>The Group has submitted a budget for 2021/22 which shows an anticipated income of £11,890 against an anticipated expenditure of £13,525, resulting in an anticipated deficit of £1,635.</p> <p>Anticipated income includes subscriptions (£7,000), royalties and online income (£3,500) and Gift Aid (£1,160). Items of expenditure</p>
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	include Root and Branch Journal (£6,500), centre meetings (£2,450) and storage (£3,500).
2.2 Accounts	The Group has submitted draft accounts for 2019/20 which show an income of £13,565 (£14,617 in 2018/19) against expenditure of £15,135 (£15,667 in 2018/19), resulting in a deficit of £1,570 (a deficit of £1,050 in 2018/19). The sum of £25,670 was carried forward at the end of the 2019/20 year.
2.3 Support over the past five years	New application.

3.0 Assessment of Application		
3.1 Key Information	<ul style="list-style-type: none"> ○ Constitution ○ Registered Charity ○ VAT Registered ○ Equal Opportunities Policy ○ Safeguarding Policy ○ Reserves Policy ○ Quality Mark ○ Other funding sources pursued ○ Other support by the Council ○ Fundraising ○ Two quotes ○ Regular monitoring provided previously 	<ul style="list-style-type: none"> Yes Yes No No No Yes No No No No N/A N/A
3.2 Consultee Comments	None.	
3.3 Assessment	<p>For nearly two decades, the Society has been holding an annual Family History Fair in Woking, a popular event supported most years by an official visit from the Mayor or Deputy Mayor. Representatives from the Group attend many other events organised by family history societies in the South-East along with large commercial events in areas such as London and Birmingham.</p> <p>At events such as the Woking-based Fair, there is strong demand for help and advice from experts on Help Desks who cover general research and specific topics such as the Armed Forces, old photographs, old handwriting and DNA. The Fair has included stallholders such as the Surrey History Centre, The Lightbox and local societies for many years. There are also free talks taking place throughout the day.</p> <p>The Group has around 650 users in total, of whom 75 are based in Woking. Members can borrow numerous books about Surrey and general family or local history from the Reference Library. Members can ask for help and guidance with their research and can submit specific queries through the Group's 'Root & Branch' quarterly</p>	

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magazines.

The Fairs have previously been funded from general annual income, with a small amount charged to other stallholders. All visitors can attend free of charge. During the last few years the costs have increased and the Group has been relying on its reserves. The Society does not carry out any direct fundraising though promotes itself with a view to increasing membership at family and local history events, held at Alexandra Palace, Sandown Park, Staines, Dorking and Brookwood Cemetery.

The Society is therefore applying for a grant of £2,000 towards the Fair to be held in November 2021 at Woking Leisure Centre. It is noted that the event is well attended and organised, with the chance for visitors to seek knowledge from the experience of stallholder and experts on hand to provide advice. However, in light of the ongoing budget constraints it is considered that funding should not be awarded to support the Fair. It is further noted that the Group does not currently have an Equalities or Safeguarding Policy.

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