

THE BURGON SOCIETY

Trustees' Annual Report and Financial Statements

For the Year Ended 31 December 2020

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Reference and Administrative Details

Charity Registration Number	1137522
Registered Office	9 Pymore Road Bridport Dorset DT6 3XE
Trustees	Jonathan Cooper Graham Deans (retired 10 October 2020) William Gibson Thomas Goodman Alice Hynes (Secretary, from 10 October 2020) Nicholas Jackson Ian Johnson (Treasurer) Alex Kerr (Secretary, retired 10 October 2020) Andrew North (Chairman) Sandra Wearden Stephen Wolgast
Bankers	HSBC 102 Brompton Road London SW3 1JJ KS Bank PO Box 69 Manhattan KS 66505-0069 USA
Independent Examiner	Sue Kowszum BA FCA DChA Harlequin Accounting and Financial Services Limited Bancroft Mill Road West Chiltington West Sussex RH20 2PZ

1 Report of the Trustees

The Trustees of the Burgon Society present their Annual Report and Financial Statements for the year ended 31 December 2020. These comply with the governing documents of the Charity, the relevant Statement of Recommended Practice (the Charities SORP 2015), Financial Reporting Standard 102 and the Charities Act 2011.

The Burgon Society was founded in 2000 in response to a growing interest in the subject of academical dress. The Society was registered with the Charity Commission in England and Wales in 2009 as Charity No. 1137522.

1.1 Objectives of the Charity

The objects of the Society are the furtherance of education in particular through the study of academical dress in all its aspects and the publication and dissemination of research concerning academical dress. It does this through:

- coordinating the study of academical dress in all its aspects of design, history and practice, leading to the Society's Fellowship (FBS);
- preserving details of the past and present practices of institutions regarding academical dress;
- acting in an advisory capacity to those who wish to ensure correctness in the usage of academical dress in any capacity.

1.2 Public Benefit

The Trustees have complied with their duty to have due regard to the Charities Commission's public benefit guidance when exercising their powers and duties to which that guidance is relevant. The following section describes how they have done this.

1.3 Activities for the Year Ended 31 December 2020

The Society's activities and operations focus on various aspects of its charitable obligations, in particular the advancement of scholarly study of various aspects of academical dress and related matters; holding conferences to present such research; publishing edited collections of historical documents related to the subject and acquiring, cataloguing and curating a collection of academical dress and related historical documents. The particular activities of 2020 are summarised in the following sections.

1.3.1 Studies

Five fellows were elected in 2020 after successfully completing the Society's examination:

- Martin Hardcastle: *Cap and gown? Use of headgear at graduation in UK universities in the 21st century*;
- Jack Lindsay: *Academical dress of Australia*;

- Brian Newman: *The evolution of undergraduate academic dress at the University of Cambridge and its constituent colleges*;
- David Parker: *University of Leeds academic dress*;
- Scott Pilkington: *History and development of university doctoral academic dress in Aotearoa (New Zealand)*.

1.3.2 Publications

Burton Notes continued to be published quarterly. It contains summaries of Society activities and short articles related to academical dress.

With the Covid-19 pandemic cancelling events in 2020, the editorial board made a special effort to include more articles in Volume 19 of *Transactions of the Burton Society* so that the members would have more to read to make up, in part, for the absence of in-person meetings.

In October 2020 we published eight articles in a 208-page volume, an increase of three articles and 80 pages over Volume 18. The journal was sent by post to all members. The Society printed 325 copies, of which we distributed or sold all but three.

Articles from *Transactions of the Burton Society* are posted online by New Prairie Press, a service provided by the library of Kansas State University to host scholarly journals. In 2020 our articles were downloaded 13,474 times, an increase of 105.9 per cent over the previous year. Some details are below.

Downloads by country	
Country	No. of downloads
United States of America	5,661
United Kingdom	3,404
Australia	391
Canada	386
China	345
New Zealand	254
Germany	209
Russian Federation	172
Republic of Ireland	169
South Africa	147

In 2020 we changed our online posting practice so that articles may be downloaded one year after the publication of the journal (instead of after fifteen months). The articles from Volume 18 were made available on 20 October 2020.

The Society continues to produce other publications in the field of academic dress. It was agreed with the editor of *Shaw's Academical Dress* that the fourth edition would be accurate up to 31 December 2020. Since the British and Irish higher education landscape is continually changing such a cut-off date was necessary to allow the editor and proof-readers to compile the new addition.

1.3.3 Collection and Archive

The Society's represents the largest, and most important, collection of academic dress, and associated items in the world. The Curator, Chris Williams, uses

the guidelines of The Collections Trust and The Museums Association for best practices regarding collection management.

In 2020, 181 items were accessioned into the archive. During this period, the archived was inventoried against the holdings spreadsheet. Whilst the spreadsheet was 80% correct, there were a number of items that had not been added to the archive, for example, having been donated during the period when there was no curator. Every item, therefore, no matter how small, or large, had to be accessioned into the collection with an accession number which cannot be altered or removed. If an item is permanently removed from the collection for any reason, it is still noted in the accession catalogue, in chronological order, but with a line through it. Therefore, 2020 was the year to ensure that the spreadsheet and the physical archive matched. Items that did not have an accession number were added.

A large number of new items were received into the collection, including 27 Liverpool University hoods, a donation from Graduation Attire, and 10 ICC hoods from various American Universities from a private benefactor. The Society was donated items that have belonged to various significant people including, for example, Sir Gordon Hobday and Canon Anthony Caesar. All in all, 88 new donations were received, and 18 items purchased. The remaining items were either given fresh accession numbers (a number of items had obviously been lost in the past, and then subsequently found, and had, at some point, been given the reference LOST:xxx) or given new accession numbers as they had never been included in the catalogue before. The wardrobe reference numbering system (WBS-xxx) had been abandoned in 2017. However, as this was still the method that most members used to refer to items, and had been used for items between 2000–2017, it was decided to re-instate them, to run alongside the accession numbers. It meant that sets could be identified as such (WBS-123a, WBS-123b &c.) to denote a gown and hood that belonged together, in a way that the accession number (which is simply the year, followed by a chronological number) could not.

In addition to the wardrobe archive, the paper archive was also given a new lease of life. It is accessible to any member on request, and the cataloguing of that was started in 2020.

At the start of 2020 it was not possible to say, with any certainty, what was in the archive, where it was, and what its condition was. By the end of 2020 we are able to pin-point with precise accuracy, the location of any item, from a full set of robes, including hood and bonnet, down to a single piece of lace gimp, or a letter from the Ward collection.

Guidelines have been produced to issue to anyone donating items to us, and guidelines for any members wishing to visit the archive in person.

Looking forward, by the end of 2021, the paper archive will be complete, and every item in the wardrobe will have at least two photographs, and condition report, available to view.

1.3.4 Conferences and other events

The Committee had planned the usual series of events for 2020 including the Spring Conference in April and the Annual Congregation with AGM in October. However, due to legal restrictions either prohibiting such gatherings, or making them practically impossible to hold, both events were cancelled.

Recognising video conferencing as a way to hold events online, on 17 October 2020 the Society hosted its first Virtual Speaker Event where Martin Hardcastle discussed his research about the use of the squarecap at British graduation ceremonies.

Additionally, the Executive Committee decided to hold the 2020 AGM *via* correspondence format to ensure those without access to video conferencing had the opportunity to question the Committee. Papers were circulated to the membership with the opportunity to submit questions by 26 September 2020. Answers to these questions were sent on 10 October 2020, which is also the date the new committee took office.

1.3.5 Membership

Category	UK	Non-UK	Total	2019
Subscribing Fellows	45	18	63	60
Other individual members (subscribing)	116	41	157	137
Total subscribing individual membership	161	59	220	197
Corporate members	13	1	14	13
Non-subscribing Fellow	22	6	28	28

In the course of 2020, 41 new individual members and 1 corporate member joined the Society. In the period 18 individual members lapsed for non-payment of their subscriptions, resigned, or died.

1.3.6 Stakeholder Engagement

Due to the restrictions imposed by the novel coronavirus pandemic the mail shot to Vice Chancellors of British and US universities did not go ahead as planned during 2020. This project has now been rescheduled for Spring 2022.

In the meantime, a database comprising different stakeholder groups is being developed for the Society for use as a resource, and as a means of mapping our stakeholder activity over time. In addition, a questionnaire is being prepared to send to members of the society to mark its twentieth anniversary by collecting feedback from our primary stakeholder base. Finally, the portfolio holder is also now working closely with the member of the Society who is managing our social media accounts to ensure social media communications and stakeholder engagement activities are aligned.

These activities conform with the current remit of stakeholder engagement as agreed by the Chairman and Executive Committee of the Society.

1.3.7 Social Media and Online Presence

The Society maintains an active social media profile on Twitter (@burgonsoc) to showcase the Society's open access research publications and raise the visibility of the Society's activities to a global audience. Throughout 2020 the number of followers grew steadily and passed 1500. The social media presence enjoys an extremely high level of quality engagement from key stakeholders, higher educational and national cultural institutions, alongside the Society's Members and

Fellows. It is often the first point of contact by the public and has encouraged new members from around the world to join.

The Society continues to host <https://www.burgon.org.uk> as the Society's website. It is used for news and updates as well as a channel for new members to join the Society.

2 Governance and Management

The Society is governed by a Constitution drawn up in consultation with the Charity Commission of England and Wales and approved by the Society in October 2009.

The Executive Committee, all of whom act also as Trustees of the Charity, meet at least three times a year. As required by the Charity's Constitution, the Trustees are re-elected annually by the Subscribing Fellows.

No staff are employed by the Society, which is entirely reliant upon volunteers.

2.1 Trustees' responsibilities in the preparation of financial statements

The Trustees (who are also the Executive Committee of the Charity) are responsible for preparing the Trustees' Annual Report and Financial Statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

In preparing those financial statements, the Trustees are required to:

- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles in the Charities SORP;
- Make judgement and estimates that are reasonable and prudent;
- State whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements; and
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Society will continue on that basis.

The Trustees and Executive Committee are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Society and enable them to ensure that the financial statements comply with the applicable law. They are also responsible for safeguarding the assets of the Society and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The Trustees are responsible for the maintenance and integrity of the corporate and financial information on the Charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

2.2 Risk Management

The major risks to which the Trustees believe the Charity is exposed are discussed at Trustee meetings and are reviewed on a regular basis. The Trustees believe that, as far as is practical, these risks are managed in an appropriate manner. The Charity's governing documents and policies are reviewed regularly to ensure that they keep pace with developments in best practice.

2.3 Grant Making Policy

At present, the Charity only awards grants in support of projects with which it is engaged and no grants were made during 2020. (2019: Nil)

2.4 Reserves

The Trustees' policy with regard to reserves is to make suitable expenditure on the ongoing activities of the Charity, whilst maintaining adequate funds to deal with current and medium-term needs, and having the necessary provision to deal with unforeseen circumstances. As at 31 December 2020, the Charity's free reserves were £18,271 (2019: £15,204).

2.5 Going Concern

After making appropriate enquiries, the Trustees have reasonable expectation that the Society has adequate resources to continue to adopt the going concern basis in preparing the financial statements.

2.6 Independent Examiner

In view of the scale of the Society's activities and net assets, neither an independent audit nor an independent examination of the Financial Statements is required. However, the Trustees have resolved to have an independent examination and this has been carried out by Sue Kowszun BA FCA DChA.

2.7 Statement of disclosure of information to the Independent Examiner

The Trustees and Executive Committee at the date of approval of this Trustees' annual report confirm that, so far as each of them is aware, there is no relevant examinable information of which the Charity's independent examiner is unaware, and the Trustees and directors have taken all steps that they ought to have taken to make themselves aware of any relevant.

On behalf of the Trustees:



Andrew North, FBS, *Chairman*



Ian Johnson, FBS, *Treasurer*

3 Independent Examiner's Report

I report to the trustees on my examination of the financial statements of The Burgon Society (the Society) for the year ended 31 December 2020.

3.1 Responsibilities and basis of report

As the trustees of the Society 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 Society's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

3.2 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 Society as required by section 130 of the Act; or
2. The financial statements do not accord with those records; or
3. The financial statements 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 financial statements 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.



Sue Kowszun, BA FCA DChA
Harlequin Accounting and Financial Services Limited
Bancroft, Mill Road, West Chiltington, West Sussex RH20 2PZ

4 Statement of Financial Activities

	Note	Total Funds 2020 £	Total Funds 2019 £
INCOME			
Donations and legacies	2	9,613	8,155
Income from charitable activities	3	2,005	3,058
Investment Income		38	-
Total income		11,656	11,213
EXPENDITURE			
Expenditure on charitable activities	4	8,589	11,219
Net income for the year		3,067	(6)
Total funds brought forward		15,204	15,210
Total funds carried forward		18,271	15,204

4.1 Balance Sheet

	Notes	2020 £	2019 £
Current Assets			
Stock		800	495
Debtors	7	1,012	1,488
Cash at bank		17,139	14,296
Creditors: amounts due within one year, net current assets	8	680	1,075
Net assets		18,271	15,204
Total unrestricted funds		18,271	15,204

The accompanying accounting policies and notes form an integral part of these financial statements.

These financial statements and notes on pages 11–16 were approved and authorised for issue by the Trustees on 13 June 2021 and signed on their behalf by:



Ian Johnson, FBS, *Treasurer*

4.2 Notes to the financial statements

Note 1: Accounting Policies

Basis of preparation

The financial statements have been prepared under the historical cost convention and they have been prepared in accordance with the “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)”. They also comply with the Charities Act 2011.

The Society meets the definition of a public benefit entity under FRS 102.

These unaudited financial statements have been subjected to independent examination. See report on page 10.

The principal accounting policies of the Society have remained unchanged from the previous year and are set out below.

Going Concern

The financial statements have been prepared on the going concern basis.

Income

Incoming resources are included gross, without netting off any related expenditure. Incoming resources, including legacies, are generally recognised when the society receives them:

- Donations are included in the Statement of Financial Activities (SOFA) gross of any related tax claim received.
- Income relating specifically to a future accounting period is deferred.
- Interest on funds on deposit is included when receivable.

Gift Aid is included based on the amount recoverable at the accounting date.

Expenditure

Expenditure is included by the Society on an accruals basis and is allocated between:

- Expenditure incurred directly in the furtherance of the Society’s objectives.
- Expenditure incurred directly in the management and administration of the Society.
- Expenditure incurred directly on activities necessary for the Society to comply with its statutory obligations.

Taxation

No provision for taxation, deferred or otherwise, has been made in the financial statements of the Charity, as it is a charity in accordance with the Charities Act 2011 and is exempt from taxation except for value added tax (VAT), provided that income and gains are applied for charitable purposes under s505 of the Income and Corporation Taxes Act 1988 and s252 of the Taxation of Chargeable Gains Act 1992. VAT is included in the cost of those items to which it relates.

Foreign Currency

Transactions in foreign currency are recorded at the average rate of exchange prevailing during that month. Foreign currency balances are translated into sterling at the exchange rate prevailing at the balance sheet date. Any resulting gains or loss on exchange are included in the SOFA.

Note 2: Donations and Legacies

	Total Funds 2020 £	Total Funds 2019 £
Subscriptions	9,009	7,679
Legacy	35	-
Gifts and donations	569	476
	9,613	8,155

Note 3: Income from Charitable Activities

	Total 2020 £	Total 2019 £
Sale of publications & merchandise	1,563	1,660
Events:		
Conferences including overseas	-	1,263
Study fees	295	74
Overseas study tours	-	-
Other events	147	61
	2,005	3,058

Note 4: Expenditure on Charitable Activities

	Total 2020 £	Total 2019 £
Printing & reproduction	5,186	4,315
Merchandise costs	118	234
Events: Conference	105	1,839
Archive	1,211	1,170
Promotional activities & website	145	2,280
Miscellaneous	133	75
Activities undertaken directly	6,898	9,913
Support costs - (see note 5)	1,541	1,156
Governance costs - (see note 6)	150	150
Total charitable activities	8,589	11,219

Note 5: Support Costs

	2020 £	2019 £
Accountancy and taxation	200	200
Bank charges	131	71
Exchange difference	313	(5)
Insurance	897	890
	1,541	1,156

Note 6: Governance Costs

	2020 £	2019 £
Independent Examination	150	150

Note 7: Debtors: amounts falling due within one year

	2020 £	2019 £
Gift Aid claims receivable	974	1488
Accrued Income	38	-
	1,012	1488

Note 8: Creditors: amounts falling due within one year

	2020	2019
	£	£
Advance Membership Fees	330	395
Accruals	350	680
	680	1,075

Note 9: Trustees' Remuneration

The Society had no employees during the year (2019: Nil) and no Trustees received any remuneration or reimbursement of expenses during the year (2019: Nil). No Trustees or other person related to the Society had any personal interest in any contract or transaction entered into by the Society during the year (2019: Nil).

Note 10: Heritage Assets

The Society holds a substantial archive as a heritage asset. The Archive is split into two sections the 'Material Archive' (also known as the Wardrobe) and the 'Paper Archive'.

The Society has not capitalised these assets as their value cannot be reliably determined and the cost of so doing would not be commensurate with the benefit to the users of the accounts and Society. The most valuable items are currently insured for £37,043.

The Material Archive holds the Society's collection of academic dress. Items are mostly gowns, hoods, caps, and other wearable paraphernalia relating to academic dress. Items range in age from modern articles to extremely rare items of over 100 years old.

The Paper Archive consists of a variety of ephemera relating to the design, practice, and development of academic dress as well as items relating to the history of the Society.