

FOUNDATION FOR THE SOCIOLOGY OF HEALTH AND ILLNESS

England & Wales · Charity number 1078203

Details

Status Registered

Legal form Charitable company

Company number [03835791](#)

Registered 1999-11-12

Register [View on the Charity Commission register](#)

Contact

Address Prof Fiona Stevenson
Chair FSHI
Primary Care and Population Health
UCL Royal Free Campus
London
NW3 2PF

Phone 01206 873399

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Website www.shifoundation.org.uk

Activities

Objects: THE OBJECTS FOR WHICH THE CHARITY IS ESTABLISHED ARE FOR THE PUBLIC BENEFIT TO PROMOTE AND IMPROVE SOCIAL SCIENTIFIC RESEARCH, EDUCATION AND SCHOLARSHIP IN THE FIELD OF THE SOCIOLOGY OF HEALTH AND ILLNESS

Activities: To promote and improve for the public benefit social scientific research, education and scholarship in the field of the sociology of health and illness

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Sponsors Or Undertakes Research
- **What:** Education/training
- **Who:** Other Defined Groups, The General Public/mankind

Geography

- **Area of benefit:** WORLDWIDE
- Northern Ireland
- Scotland
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-07-31	£371,295	£527,171	-	-
2024-07-31	£369,000	£297,700	-	-
2023-07-31	£357,439	£359,059	-	-
2022-07-31	£338,234	£285,124	-	-
2021-07-31	£357,466	£166,215	-	-

Trustees

Name	Role	Appointed
Dr Jenny Douglas		2022-01-20
Ewen Speed		2020-09-10
Justin James Waring		2020-09-10
Prof Catherine Jane Pope		2024-06-06
Professor Fiona Stevenson		2024-09-28
Professor Judith Green		2020-09-10
Professor Tiago Moreira		2022-11-15

FOUNDATION FOR THE SOCIOLOGY OF HEALTH AND ILLNESS

England & Wales - Charity number 1078203

Accounts

FSHI
3rd Floor, 3 Wellington Place
Leeds, West Yorkshire
LS1 4AP

Saffery LLP
10 Wellington Place
Leeds
LS1 4AP

Dear Sirs

This representation letter is provided in connection with your preparation and independent examination of the financial statements of the Foundation for the Sociology of Health and Illness for the year ended 31 July 2025 for the purpose of filing the financial statements with the Charity Commission and Companies House of the Foundation for the Sociology of Health and Illness in accordance with The Companies Act 2006 and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

We confirm that, to the best of our knowledge and belief, having made such inquiries as we considered necessary for the purpose of appropriately informing ourselves:

Financial Statements

1. We have as trustees fulfilled our responsibility, as set out in the terms of your engagement dated 7 December 2023 under the Companies Act 2006 for preparing financial statements in accordance with The Companies Act 2006 and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) which give a true and fair view of the financial position of the charity as of 31 July 2025 and of the results of its operations for the year then ended and for making accurate representations to you.
2. The methods, data and significant assumptions used by us in making accounting estimates and their related disclosures are appropriate to achieve recognition, measurement and disclosure that is reasonable in the context of the applicable financial reporting framework.
3. We have no plans or intentions that may materially alter the carrying value and where relevant the fair value measurements or classification of assets and liabilities reflected in the financial statements.
4. We have disclosed all known actual or possible litigation and claims whose effects should be considered when preparing the financial statements and these have been disclosed in accordance with the requirements of accounting standards.
5. Related party relationships and transactions have been appropriately accounted for and disclosed and we are not aware of further related party matters that require disclosure.
6. All events subsequent to the date of the financial statements and which require disclosure or which would materially affect the amounts in the financial statements have been adjusted or included in the financial statements.
7. The financial statements are free of material misstatements, including omissions. We believe that those uncorrected misstatements identified during the preparation and independent examination of the financial statements are immaterial both individually and in aggregate to the financial statements as a whole.

8. That, having considered our expectations and intentions for the next twelve months, and the availability of working capital, the charity is a going concern. That our plans for future action(s) required to enable the charity to continue as a going concern are feasible. That the disclosures in the accounting policies are an accurate reflection of the reasons for our consideration that the financial statements should be drawn up on a going concern basis.

Information provided

9. All accounting records and relevant information have been made available to you for the purpose of your preparation and independent examination of the financial statements. We have provided to you all other information requested and given unrestricted access to persons within the entity from whom you have determined it necessary to obtain evidence. All other records and related information including minutes of all management and shareholders meetings have been made available to you.
10. All transactions undertaken by the charity have been recorded in the accounting records and are reflected in the financial statements.
11. We acknowledge our responsibility for the design, implementation and maintenance of controls to prevent and detect fraud. We have disclosed to you the results of our assessment of the risk that the financial statements may be materially misstated as a result of fraud.
12. We have disclosed to you all information in relation to fraud or suspected fraud that we are aware of and that affects the entity and involves management, employees who have a significant role in internal control, or others, where fraud could have a material effect on the financial statements.
13. We have disclosed to you all information in relation to allegations of fraud, or suspected fraud affecting the entity's financial statements communicated by employees, former employees, analysts, regulators or others.
14. We have disclosed to you all known instances of non-compliance or suspected non-compliance with laws and regulations whose effects should be considered when preparing financial statements.
15. We confirm that we have disclosed to you the identity of the entity's related parties and all related party relationships and transactions relevant to the charity that we are aware of.
16. The charity has satisfactory title to all assets, and there are no liens or encumbrances on the assets except for those disclosed in the financial statements.
17. There are no liabilities, contingent liabilities or guarantees to third parties other than those disclosed in the financial statements.
18. Grants and donations

All grants, donations and other income, the receipt of which is subject to specific terms or conditions, have been notified to you. There have been no breaches of terms or conditions during the period in the application of such income.
19. Legacies and similar sources of assets

Notifications of legacies and similar sources of assets have been monitored, and all such assets have been recognised in accordance with the recommendations of the SORP on charity reporting.

We confirm to the best of our knowledge and belief that the above representations are made on the basis of enquiries of management and staff with relevant knowledge and experience and, where appropriate, of inspection of supporting documentation sufficient to satisfy ourselves that we can properly make each of the above representations to you.

Yours faithfully

Signed by:

Professor Catherine Pope

A7651243E5E1496...

Professor Catherine Pope
Signed on behalf of the board of directors

15 December 2025
Date:.....

Company Number: 03835791
Charity Number: 1078203

**Foundation for the Sociology
of Health and Illness
(A company limited by Guarantee)**

Trustees' Report and Financial Statements

For the Year Ended 31 July 2025

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

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Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Trustees' Report
For the Year Ended 31 July 2025

The trustees (who are also directors of the company) present their report and the financial statements for the year ended 31 July 2025. The financial statements have been prepared in accordance with the Companies Act 2006 and Charities Act 2011. The company has adopted FRS102 and complies with the Statement of Recommended Practice 'Accounting and Reporting by Charities' (effective 1 January 2019).

a) Reference and Administrative details of the Charity

Name	Foundation for the Sociology of Health and Illness
Charity Number	1078203
Company Number	03835791 (registered in England and Wales)
Trustees	Professor E C Annandale (Chair) (resigned 10 September 2025) Professor C J Pope (Treasurer) Professor J J Waring Professor J Green Professor E Speed Professor S L Hatch (resigned 10 September 2025) Doctor J Douglas Professor T Moreira Professor F A Stevenson (appointed 28 September 2024) Professor R Barbour (resigned 11 September 2024) Professor S B Ziebland (resigned 11 September 2024)
Company Secretary	Wrigleys Solicitors LLP 3 rd Floor, 3 Wellington Place, Leeds, West Yorkshire LS1 4AP
Registered Office	3 rd Floor, 3 Wellington Place Leeds, West Yorkshire LS1 4AP

**Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)**

**Trustees' Report
For the Year Ended 31 July 2025**

Independent examiners	Saffery LLP 10 Wellington Place Leeds LS1 4AP
Solicitors	Wrigleys Solicitors LLP 3 rd Floor, 3 Wellington Place Leeds, West Yorkshire LS1 4AP
Bankers	National Westminster Bank Plc 21 High Street, Llandaff, Cardiff CF5 2YT Bank of Scotland The Mound Edinburgh EH1 1YZ

b) Structure, governance and management

The governing document for the Foundation is the Memorandum and Articles of Association and the charity is constituted as a private company limited by guarantee. The company was incorporated on 3 September 1999, and its Articles of Association were amended by special resolutions dated 1 November 1999 and 9 September 2020.

The Governing Body currently consists of 8 trustees/directors. These are all senior researchers and academics who are, or have been, actively researching or teaching in the field. Trustees are appointed by the members and/or by the trustees. The individuals on page 1 were directors and trustees of the company during the year.

There is a minimum of five and a maximum of ten trustees, who may not be paid from the Charity.

The trustees are all members of the Foundation and have voting rights at the Annual General Meeting. All Editorial Board members of the Foundation's journal, *Sociology of Health and Illness*, are members of the Foundation and have voting rights at the Annual General Meeting of the Charity, which is held at the annual British Medical Sociology Conference in September. Up to five other members can be appointed at the discretion of the trustees.

The trustees meet formally at least three times a year to discuss strategy for the next year and take decisions. On-going debate is conducted via email and telephone conferencing.

On appointment, trustees are given an induction to the work of the charity and provided with the information necessary for them to perform their role successfully, including a copy of the

Foundation for the Sociology of Health and Illness (A company limited by Guarantee)

Trustees' Report For the Year Ended 31 July 2025

charity's governing document, a copy of the recent annual report and accounts and the Charity Commission's guidance "CC3a – The Essential Trustee: An Introduction" and "Charities and Public Benefit: The Charity Commission's general guidance on public benefit".

The major risks to which the charity is exposed have been reviewed and we are confident that our reserves policy is the most appropriate way to manage the most serious potential threat, namely sharp decline in our income from the profits of the journal.

c) Objectives and activities

The principal objective for which the Charity is established is to promote and improve for the public benefit social scientific research, education and scholarship in the field of the sociology of health and illness.

The main activities that the Foundation undertakes in pursuance of this aim are:

1. Publication of a journal, *Sociology of Health and Illness*;
2. Support for conferences, workshops and other educational activities;
3. Provision for individuals to participate in conferences, courses and other educational activities;
4. Provision of fellowships for post-doctoral early career researchers; and
5. The arrangement or support for research and activities related to research.

The trustees have given due consideration to Charity Commission published Guidance on the operation of the Public Benefit requirement.

d) Achievements and performance

The Foundation's Awards, 2024-25

Mildred Blaxter Post-Doctoral Fellowships.

There were five awards for Fellowships in 2024-2025. Two Fellowships were awarded in Autumn 2024 and three in Spring 2025. These were to:

Katharine Cheston – Durham University – The stigma of 'medically unexplained symptoms'

Becka Hudson – Birkbeck College – Diagnosis Trauma: Confinement, Racialisation and Psychic Injury

Emily Yue – Edinburgh University – Situating UK Suicide Research as Anti-Racist Work.

Francesca Dakin – Oxford University – The Digital Facsimile in AI-enabled Access and Triage

Lauren Bridgstock – Manchester Met – Is elderspeak always inappropriate?

**Foundation for the Sociology of Health and Illness
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**Trustees' Report
For the Year Ended 31 July 2025**

Post Graduate International Conference Travel Grants

During the year three awards were made by the Foundation (2024: 8).

Symposia & Workshops.

There were five awards made in 2024-25. In the prior year, 6 awards were made.

Research Grant Development Awards.

Six awards (2024: 3 awards) were made this financial year, three in Autumn 24 and three in Spring 25:

1. Laura Abbott – Hertfordshire University – Lost mothers in transition
2. Lisa Ashmore – Lancaster University – A multi-stakeholder exploration of the production and enactment of knowledge about HPV related Head and Neck Cancers
3. Marian Peacock – Edinburgh University – Understanding functional seizures (FS) in their social, cultural, historical and political contexts.
4. Volkan Yilmaz – Ulster University – Platformisation in Health & Social Care
5. Carrie Purcell – Open University – Sexual & Reproductive Health & Rights Research Collective
6. Erica Borgstrom – Open University – Grieving Divergently?

e) Financial review

The deficit for the year amounted to £155,876 (2024: surplus of £71,300). At the year-end unrestricted reserves were £940,919 (2024: £1,096,795) of which £449,013 (2024: £653,293) represent unrestricted general reserves and £491,906 (2024: £443,502) represent unrestricted designated reserves.

f) Plans for future periods

As well as supporting the continuing work of the editorial team at the Universities of Newcastle and Cardiff, the trustees will advertise and fund up to four Mildred Blaxter Fellowships, fifteen Post-Graduate travel awards, six Symposia/Workshops, and six Research Grant Development awards during the financial year 2025-26. Details of how to apply for the awards and closing dates for applications are made available on the Foundation's website.

g) Reserves policy

The trustees have reviewed the charity's needs for reserves in line with the guidance issued by the Charity Commission. It is the policy of the charity to carry forward sufficient funds in reserve to cover any shortfall to cover committed editorial expenses and research awards, were income to decline. The trustees consider a level of £300,000 to be appropriate for this purpose and

Foundation for the Sociology of Health and Illness
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Trustees' Report
For the Year Ended 31 July 2025

reviewed this sum during the year. During the financial year the free reserves have been in excess of this amount and it is the aim of the trustees to continue to pay out more grants to reduce these during the year to 31 July 2026.

Statement of trustees' responsibilities

The trustees (who are also directors of the Foundation for the Sociology of Health and Illness for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these 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 (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable 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 charity will continue in business.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Small companies exemption

This report has been prepared in accordance with the provisions applicable to companies entitled to the small companies exemption.

By order of the board

Signed by:

Professor Catherine Pope
Treasurer

Date: 15 December 2025

**Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)**

**Independent Examiner's Report to the Members
For the Year Ended 31 July 2025**

Independent examiner's report to the trustees of Foundation for the Sociology of Health and Illness

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 July 2025.

Respective responsibilities of trustees and examiner

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

Basis of independent examiner's report

My 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 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 you as 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

Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of The Institute of Chartered Accountants in England and Wales (ICAEW), which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or

**Foundation for the Sociology of Health and Illness
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**Independent Examiner's Report (Continued)
For the Year Ended 31 July 2025**

2. the accounts do not accord with those records; or

3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or

4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102).

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.

Signed:

Sally Appleton
FCA CTA
Saffery LLP
10 Wellington Place
Leeds
Yorkshire
LS1 4AP

Date:

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Statement of Financial Activities
For the Year Ended 31 July 2025

	Notes	Unrestricted funds	
		2025 £	2024 £
Income and endowments from:			
Charitable activities	3	368,598	366,027
Investments			
Bank interest receivable		2,697	2,973
Total		<u>371,295</u>	<u>369,000</u>
Expenditure on:			
Charitable activities	7		
Publishing		120,446	103,673
Grant making		373,387	158,745
Support costs		<u>33,338</u>	<u>35,282</u>
Total		<u>(527,171)</u>	<u>(297,700)</u>
Net (expenditure) / income	2	(155,876)	71,300
Total funds brought forward		1,096,795	1,025,495
Total funds carried forward		<u>940,919</u>	<u>1,096,795</u>

All amounts relate to continuing operations.

There were no recognised gains or losses for the year other than those included in the statement of financial activities. The statement of financial activities incorporates an income and expenditure account.

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Balance Sheet
For the Year Ended 31 July 2025

	Notes	2025 £	2024 £
Current assets			
Cash at bank and in hand		1,047,255	1,200,821
Debtors	10	711	-
		<u>1,047,966</u>	<u>1,200,821</u>
Creditors: amounts falling due within one year	11	(107,047)	(104,026)
Total net assets		<u>940,919</u>	<u>1,096,795</u>
The funds of the charity			
Unrestricted reserves - General	12	449,013	653,293
Unrestricted reserves - Designated	13	491,906	443,502
Total charity funds		<u>940,919</u>	<u>1,096,795</u>

For the year ended 31 July 2025 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

No members have required the company to obtain an audit of its financial statements for the year in question in accordance with section 476 of the Companies Act 2006.

The directors acknowledge their responsibility for complying with the requirements of the Act with respect to accounting records and for the preparation of accounts.

These financial statements have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The notes on pages 10 to 16 form part of these financial statements.

Approved by the trustees for issue on 15 December 2025

Signed by:

 A7651243E5E1496.....
 Professor C Pope
Trustee
Company Registration No. 03835791

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2025

1 Accounting policies

(a) Basis of preparation of financial statements

These financial statements have been prepared under the historical cost convention, as modified by the revaluation of investments and investment properties, in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The financial statements of prior years were prepared in accordance with applicable accounting standards and complied with the Charities Act 2011. The trustees consider the Charities SORP (FRS 102) to be the appropriate reporting framework of the Charity and as such have chosen to prepare these financial statements in accordance with this framework.

The Foundation for the Sociology of Health and Illness meet the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy.

(b) Preparation of the accounts on a going concern basis

At the time of approving the financial statements, the trustees have considered forecasts and have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

(c) Fund accounting

As detailed in note 13 to the financial statements, the trustees have recognised an unrestricted designated fund for the balance of awards accepted during the year ended 31 July 2025 which remain unclaimed at the balance sheet date.

(d) Incoming resources - charitable activities

Incoming resources from charitable activities comprise royalties from the sale of journals. Income is recognised in line with the royalty income agreement.

(e) Expenditure

Grants are accounted for in the year in which a binding obligation arises. Where there is an intention to make a grant which will be payable in a future year, and which is subject to the fulfilment of appropriate terms and conditions, an accrual will not be made unless the conditions have been fulfilled by the balance sheet date or are dependent on an external event over which the Charity has no control. However, where conditions have been met, it is the Charity's policy that such grants are subject to the receipt and review of a satisfactory report before payment can proceed; therefore, no binding obligations will arise in respect of such commitments until the Charity has confirmed the relevant grant.

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Notes to the financial statements
For the Year Ended 31 July 2025

The administration costs of the Charity are allocated to grant making activities. The amounts paid each year to the publishers include an allowance for administration.

Governance costs comprise fees payable to the Charity's independent examiner and expenses paid to trustees.

(f) Financial instruments

The Charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

(g) Critical accounting policies and key sources of estimate uncertainty

In the application of the company's accounting policies, the trustees are required to make judgments, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

There are no estimates and assumptions which have a significant risk of causing a material adjustment to the carrying amount of assets and liabilities.

Foundation for the Sociology of Health and Illness
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Notes to the financial statements
For the Year Ended 31 July 2025

2	Net incoming resources for the period Net incoming resources are stated after charging:	2025 £	2024 £
	Fees payable to the company’s independent examiner for the independent examination of the annual accounts	6,896	6,695
3	Income from charitable activities	2025 £	2024 £
	Royalties received	368,598	366,027
		368,598	366,027
4	Trustees and employees The trustees received £nil emoluments during the year (2024: £nil). £1,546 was paid for travel expenses to 7 (2024: 7) trustees during the year (2024: £2,092). Administrative duties are carried out by the Treasurer of the Foundation on a voluntary basis, assisted by an employed administrative assistant.		
5	Taxation The charitable company is exempt from corporation tax on its charitable activities.		
6	Status and control The Foundation for the Sociology of Health and Illness is a company limited by guarantee, not having a share capital. The liability of members is limited to £1. At 31 July 2025, the company had 9 members (2024: 9) who controlled the company.		

Foundation for the Sociology of Health and Illness
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Notes to the financial statements
For the Year Ended 31 July 2025

7 Analysis of expenditure on charitable activities

	Activities Undertaken directly £	Grant funding of activities £	Support costs £	2025 Total £	2024 £
Publishing costs	120,446	-	-	120,446	103,673
Grant making (note 9)	-	373,387	-	373,387	158,745
Support costs (note 8)	-	-	33,338	33,338	35,282
	<u>120,446</u>	<u>373,387</u>	<u>33,338</u>	<u>527,171</u>	<u>297,700</u>

8 Support costs

	Charitable activities		Basis
	2025 £	2024 £	
Legal fees	8,175	9,426	Direct allocation
Governance	11,960	9,218	Direct allocation
Travel and subsistence	1,621	2,092	Direct allocation
Wages	11,582	14,546	Direct allocation
Total support costs	<u>33,338</u>	<u>35,282</u>	

The charity employed an average of 1 (2024: 1) employee in the year. There is no employee who received over £60,000 of employee benefits in the year.

Included within governance costs are costs of £8,580 (2024: 8,190) for the independent examination of the charity financial statements.

9 Grants awarded

Details of the awards are given below:

	2025 £	2024 £
Post graduate international travel grants	3,193	11,026
Mildred Baxter Post Doctoral Fellowship	330,447	127,646
Symposium and workshop awards	15,019	17,396
Research grant development awards	19,183	1,677
Foundation awards book prize	-	1,000
BSA Medical Sociology conference bursaries	5,545	-
Total grants awarded	<u>373,387</u>	<u>158,745</u>

Foundation for the Sociology of Health and Illness
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Notes to the financial statements
For the Year Ended 31 July 2025

9 Grants awarded (continued)	2025	2024
	£	£
Reconciliation of grants payable		
Brought forward at 1 August 2024	-	-
New commitments made	32,856	-
Carried forward at 31 July 2025	32,856	-
Recipient organisation - institutions		
Mildred Blaxter Post Doctoral Fellowship		
University of Oxford	50,034	34,146
University of Lincoln	-	23,534
University of Sheffield	23,414	50,835
Cardiff University	-	19,131
University of Leicester	26,856	-
University of Nottingham	42,400	-
Nottingham Trent University	50,941	-
Newcastle University	50,145	-
University of Exeter	14,953	-
King's College London	32,856	-
University of Edinburgh	38,848	-
Research grant development awards		
University of London	-	1,677
University of Oxford	5,970	-
Angelia Ruskin University	5,982	-
University of Surrey	5,676	-
University of Sussex	1,555	-
Symposium and workshop awards		
University of Nottingham	-	2,066
University of Lincoln	-	2,500
University of Loughborough	-	2,040
University of Birmingham	-	5,493
University of Oxford	2,990	-
Nottingham Trent University	3,800	-
Kings College London	-	3,000
University of the West of England	-	2,297
University of Liverpool	2,490	-
Newcastle University	1,498	-
University of London	2,905	-
Cardiff University	1,336	-

Foundation for the Sociology of Health and Illness
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Notes to the financial statements
For the Year Ended 31 July 2025

Other		
Book Prize to the British Sociological Association	-	1,000
BSA Medical Sociology conference bursaries	5,545	-
Post graduate international travel grants – 4 individuals (2024: 11)	3,193	11,026
	<u>373,387</u>	<u>158,745</u>
10 Debtors		
	2025	2024
	£	£
Prepayments and accrued income	711	-
	<u>711</u>	<u>-</u>
11 Creditors: amounts falling due within one year		
	2025	2024
	£	£
Other taxation and social security	19,430	61,804
Accruals	87,617	42,222
	<u>107,047</u>	<u>104,026</u>
12 Analysis of movement in unrestricted reserves (General)		
		£
At 1 August 2024		653,293
Transferred to designated funds		(410,810)
Surplus for the year (excluding grants spent in connection to prior year commitments)		206,530
		<u>449,013</u>
At 31 July 2025		<u>449,013</u>

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2025

13 Analysis of movement in unrestricted reserves
(Designated)

	2025	2025
	£	£
At 1 August 2024	443,502	326,300
Grants spent in the year relating to prior year commitments	(362,406)	(150,719)
Transferred from unrestricted general reserve in respect of future grant commitments	410,810	267,921
At 31 July 2025	<u>491,906</u>	<u>443,502</u>

The Charity has transferred £410,810 from the unrestricted designated reserves to the unrestricted general reserves for awards made during the year which were unclaimed at the year end (2024: £267,921).

The fund is expected to be used to pay grants during the year ended 31 July 2026, with liquid resources available to meet these requirements.

14 Analysis of net assets between funds

	Unrestricted Funds	Designated Funds	Total Funds
	£	£	£
Cash at bank	522,493	524,762	1,047,255
Debtors	711	-	711
Creditors	(74,191)	(32,856)	(107,047)
Total	<u>449,013</u>	<u>491,906</u>	<u>940,919</u>

15 Related party transactions

There were no related party transactions during the current or preceding year.

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FOUNDATION FOR THE SOCIOLOGY OF HEALTH AND ILLNESS

England & Wales - Charity number 1078203

Accounts

Company Number: 03835791
Charity Number: 1078203

**Foundation for the Sociology
of Health and Illness
(A company limited by Guarantee)**

Trustees' Report and Financial Statements

For the Year Ended 31 July 2024

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

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Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Trustees' Report
For the Year Ended 31 July 2024

The trustees, who are also directors of the charity for the purposes of the Companies Act 2006 present their report with the financial statements of the charity for the year ended 31 July 2024. The financial statements comply with the Charities Act 2011, the Companies Act 2006, the Memorandum and Articles of Association, and 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).

a) Reference and Administrative details of the Charity

Name	Foundation for the Sociology of Health and Illness
Charity Number	1078203
Company Number	03835791 (registered in England and Wales)
Trustees	Professor E C Annandale (Chair) Professor C J Pope (Treasurer) (appointed 6 June 2024) Professor J J Waring Professor J Green Professor E Speed Professor S L Hatch Doctor J Douglas Professor T Moreira Professor F A Stevenson (appointed 28 September 2024) Professor R Barbour (resigned 11 September 2024) Professor S B Ziebland (resigned 11 September 2024)
Company Secretary	Malcolm Lynch Wrigleys Solicitors LLP 3 rd Floor, 3 Wellington Place, Leeds, West Yorkshire LS1 4AP
Registered Office	3 rd Floor, 3 Wellington Place Leeds, West Yorkshire LS1 4AP

Foundation for the Sociology of Health and Illness **(A company limited by Guarantee)**

Trustees' Report **For the Year Ended 31 July 2024**

Independent examiners	Saffery LLP 10 Wellington Place Leeds LS1 4AP
Solicitors	Wrigleys Solicitors LLP 3 rd Floor, 3 Wellington Place Leeds, West Yorkshire LS1 4AP
Bankers	National Westminster Bank Plc 21 High Street, Llandaff, Cardiff CF5 2YT

b) Structure, governance and management

The governing document for the Foundation is the Memorandum and Articles of Association and the charity is constituted as a private company limited by guarantee. The company was incorporated on 3 September 1999, and its Articles of Association were amended by special resolutions dated 1 November 1999 and 9 September 2020.

The Governing Body currently consists of 9 trustees/directors. These are all senior researchers and academics who are, or have been, actively researching or teaching in the field. Trustees are appointed by the members and/or by the trustees. The individuals on page 1 were directors and trustees of the company during the year.

There is a minimum of five and a maximum of ten trustees, who may not be paid from the Charity.

The trustees are all members of the Foundation and have voting rights at the Annual General Meeting. All Editorial Board members of the Foundation's journal, *Sociology of Health and Illness*, are members of the Foundation and have voting rights at the Annual General Meeting of the Charity, which is held at the annual British Medical Sociology Conference in September. Up to five other members can be appointed at the discretion of the trustees.

The trustees meet formally at least three times a year to discuss strategy for the next year and take decisions. On-going debate is conducted via email and telephone conferencing.

On appointment, trustees are given an induction to the work of the charity and provided with the information necessary for them to perform their role successfully, including a copy of the charity's governing document, a copy of the recent annual report and accounts and the Charity Commission's guidance "CC3a – The Essential Trustee: An Introduction" (Crown Copyright 2008) and "Charities and Public Benefit: The Charity Commission's general guidance on public benefit" (Crown Copyright 2008).

**Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)**

**Trustees' Report
For the Year Ended 31 July 2024**

The major risks to which the charity is exposed have been reviewed and we are confident that our reserves policy is the most appropriate way to manage the most serious potential threat, namely sharp decline in our income from the profits of the journal.

c) Objectives and activities

The principal objective for which the Charity is established is to promote and improve for the public benefit social scientific research, education and scholarship in the field of the sociology of health and illness.

The main activities that the Foundation undertakes in pursuance of this aim are:

1. Publication of a journal, *Sociology of Health and Illness*;
2. Support for conferences, workshops and other educational activities;
3. Provision for individuals to participate in conferences, courses and other educational activities;
4. Provision of fellowships for post-doctoral early career researchers; and
5. The arrangement or support for research and activities related to research.

The trustees have given due consideration to Charity Commission published Guidance on the operation of the Public Benefit requirement.

Fundraising

The Charity does not carry out any direct fundraising activity.

d) Achievements and performance

The Foundation's Awards, 2023-24

Mildred Blaxter Post-Doctoral Fellowships.

There were three applications for Fellowships in 2023-2024. Two Fellowships were awarded in Autumn 2023 and one in Spring 2024. These were to:

Amanda Light – Nottingham Trent University – Precarious Health

Abigail Croydon – Kings College London – Experts by experience in social care organisations: how far do these roles involve a reciprocal exchange of learning and promote the social participation of people with intellectual and developmental disabilities?

Tiba Bonyad – University of Limerick – Assisted Reproduction and Secrecy: Redefining the gendered politics of egg donation in Iran

**Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)**

**Trustees' Report
For the Year Ended 31 July 2024**

Post Graduate International Conference Travel Grants

During the year eight applications for these awards were received by the Foundation (2023: 8). Eight awards were made this financial year (2023: 8).

Symposia & Workshops.

There were six applications received in 2023-24. In the prior year, 5 applications were received.

Research Grant Development Awards.

Three applications were received, two in Autumn 23 and one in Spring 24. Three RGDA awards were made this financial year:

1. Catherine Coveney – Brunel University London – Researching biosocial rhythms in the context of disability, ageing and care across a life course.
2. Anna Dowrick – University of Oxford – Experiences of uptake of new technologies of detection in the UK and Denmark.
3. Alison Pilnick – Manchester Metropolitan University – Assessing the interactional authenticity of technology-mediated communication skills training for healthcare professionals (AI-COST).

Foundation for the Sociology of Health and Illness **(A company limited by Guarantee)**

Trustees' Report **For the Year Ended 31 July 2024**

e) Financial review

The surplus for the year amounted to £71,300 (2023: deficit of £1,620). At the year-end unrestricted reserves were £1,096,795 (2023: £1,025,495) of which £653,293 (2023: £699,195) represent unrestricted general reserves and £443,502 (2023: £326,300) represent unrestricted designated reserves.

f) Plans for future periods

As well as supporting the continuing work of the editorial team at the Universities of Newcastle and Cardiff, the trustees will advertise and fund up to four Mildred Blaxter Fellowships, ten Post-Graduate travel awards, six Symposia/Workshops, and six Research Grant Development awards during the financial year 2024-25. Details of how to apply for the awards and closing dates for applications are made available on the Foundation's website.

g) Reserves policy

The trustees have reviewed the charity's needs for reserves in line with the guidance issued by the Charity Commission. It is the policy of the charity to carry forward sufficient funds in reserve to cover any shortfall to cover committed editorial expenses and research awards, were income to decline. The trustees consider a level of £200,000 to be appropriate for this purpose, and have reviewed this sum several times during the year. During the financial year the free reserves have been in excess of this amount and it is the aim of the trustees to pay out more grants to reduce these during the year to 31 July 2025.

Statement of trustees' responsibilities

The trustees (who are also directors of the Foundation for the Sociology of Health and Illness for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these 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 (FRS 102);
 - make judgements and estimates that are reasonable and prudent;
 - state whether applicable 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 charity will continue in business.
-

**Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)**

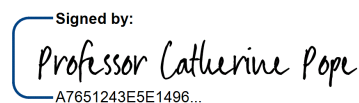
**Trustees' Report
For the Year Ended 31 July 2024**

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Small companies exemption

This report has been prepared in accordance with the provisions applicable to companies entitled to the small companies exemption.

By order of the board

Signed by:

A7651243E5E1496...

Professor Catherine Pope
Treasurer

Date: 26 March 2025

**Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)**

**Independent Examiner's Report to the Members
For the Year Ended 31 July 2024**

Independent examiner's report to the trustees of Foundation for the Sociology of Health and Illness

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 July 2024.

Respective responsibilities of trustees and examiner

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

Basis of independent examiner's report

My 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 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 you as 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

Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of The Institute of Chartered Accountants in England and Wales (ICAEW), which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or

**Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)**

**Independent Examiner's Report (Continued)
For the Year Ended 31 July 2024**

3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or

4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102).

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.

Signed:

Sally Appleton
FCA CTA
Saffery LLP
10 Wellington Place
Leeds
Yorkshire
LS1 4AP

Date:

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Statement of Financial Activities
For the Year Ended 31 July 2024

	Notes	Unrestricted funds	
		2024 £	2023 £
Income and endowments from:			
Charitable activities	3	366,027	355,838
Investments			
Bank interest receivable		2,973	1,601
Total		<u>369,000</u>	<u>357,439</u>
Expenditure on:			
Charitable activities	7		
Publishing		103,673	118,427
Grant making		158,745	220,255
Support costs		<u>35,282</u>	<u>20,377</u>
Total		<u>(297,700)</u>	<u>(359,059)</u>
Net Income / (expenditure)	2	71,300	(1,620)
Total funds brought forward		1,025,495	1,027,115
Total funds carried forward		<u>1,096,795</u>	<u>1,025,495</u>

All amounts relate to continuing operations.

There were no recognised gains or losses for the year other than those included in the statement of financial activities. The statement of financial activities incorporates an income and expenditure account.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Balance Sheet
For the Year Ended 31 July 2024

	Notes	2024 £	2023 £
Current assets			
Cash at bank and in hand		1,200,821	1,134,748
		<u>1,200,821</u>	<u>1,134,748</u>
Creditors: amounts falling due within one year	10	(104,026)	(109,253)
Total net assets		<u>1,096,795</u>	<u>1,025,495</u>
 The funds of the charity			
Unrestricted reserves - General	11	653,293	699,195
Unrestricted reserves - Designated	12	443,502	326,300
Total charity funds		<u>1,096,795</u>	<u>1,025,495</u>

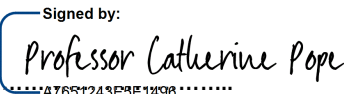
For the year ended 31 July 2024 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476 of the Companies Act 2006.

These financial statements have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The notes on pages 11 to 17 form part of these financial statements.

Approved by the trustees for issue on 26 March 2025
..... 2025.

Signed by:

.....A769T243E3E1498.....
Professor C Pope
Trustee

Company Registration No. 03835791

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2024

1 Accounting policies

(a) Basis of preparation of financial statements

These financial statements have been prepared under the historical cost convention, as modified by the revaluation of investments and investment properties, in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The financial statements of prior years were prepared in accordance with applicable accounting standards and complied with the Charities Act 2011. The trustees consider the Charities SORP (FRS 102) to be the appropriate reporting framework of the Charity and as such have chosen to prepare these financial statements in accordance with this framework.

The Foundation for the Sociology of Health and Illness meet the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy.

(b) Preparation of the accounts on a going concern basis

At the time of approving the financial statements, the trustees have considered forecasts and have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

(c) Fund accounting

As detailed in note 12 to the financial statements, the trustees have recognised an unrestricted designated fund for the balance of awards accepted during the year ended 31 July 2024 which remain unclaimed at the balance sheet date.

(d) Incoming resources - charitable activities

Incoming resources from charitable activities comprise royalties from the sale of journals. Income is recognised in line with the royalty income agreement.

(e) Expenditure

Grants are accounted for in the year in which a binding obligation arises. Where there is an intention to make a grant which will be payable in a future year, and which is subject to the fulfilment of appropriate terms and conditions, an accrual will not be made unless the conditions have been fulfilled by the balance sheet date or are dependent on an external event over which the Charity has no control. However, where conditions have been met, it is the Charity's policy that such grants are subject to the receipt and review of a satisfactory report before payment can proceed; therefore, no binding obligations will arise in respect of such commitments until the Charity has confirmed the relevant grant.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2024

The administration costs of the Charity are allocated to grant making activities. The amounts paid each year to the publishers include an allowance for administration.

Governance costs comprise fees payable to the Charity's independent examiner and expenses paid to trustees.

(f) Financial instruments

The Charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

(g) Critical accounting policies and key sources of estimate uncertainty

In the application of the company's accounting policies, the trustees are required to make judgments, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

There are no estimates and assumptions which have a significant risk of causing a material adjustment to the carrying amount of assets and liabilities.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2024

2	Net incoming resources for the period Net incoming resources are stated after charging:		
		2024	2023
		£	£
	Fees payable to the company’s independent examiner for the independent examination of the annual accounts	6,695	6,500
3	Income from charitable activities		
		2024	2023
		£	£
	Royalties received	366,027	355,838
		366,027	355,838
4	Trustees and employees The trustees, who are considered to be key management personnel, received £nil emoluments during the year (2023 - £nil). £2,092 was paid for travel expenses to 7 (2023: 8) trustees during the year (2023: £1,593). Administrative duties are carried out by the Treasurer of the Foundation, assisted by an employed administrative assistant.		
5	Taxation The charitable company is exempt from corporation tax on its charitable activities.		
6	Status and control The Foundation for the Sociology of Health and Illness is a company limited by guarantee, not having a share capital. The liability of members is limited to £1. At 31 July 2024, the company had 9 members (2023 - 9) who controlled the company.		

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2024

7 Analysis of expenditure on charitable activities

	Activities undertaken directly £	Grant funding of activities £	Support costs £	2024 Total £	2023 Total £
Publishing costs	103,673	-	-	103,673	118,427
Grant making (note 9)	-	158,745	-	158,745	220,255
Support costs (note 8)	-	-	35,282	35,282	20,377
	<u>103,673</u>	<u>158,745</u>	<u>35,282</u>	<u>297,700</u>	<u>359,059</u>

8 Support costs

	Charitable activities		Basis
	2024 £	2023 £	
Legal fees	9,426	11,169	Direct allocation
Governance	9,218	7,615	Direct allocation
Travel and subsistence	2,092	1,593	Direct allocation
Wages	14,546	-	Direct allocation
Total support costs	<u>35,282</u>	<u>20,377</u>	

The charity employed an average of 1 (2023: 0) employees in the year. There is no employee who received over £60,000 of employee benefits in the year.

9 Grants awarded

Details of the awards are given below:

	2024 £	2023 £
Post graduate international travel grants	11,026	2,801
Mildred Blaxter Post Doctoral Fellowship	127,646	165,385
Symposium and workshop awards	17,396	8,570
Research grant development awards	1,677	42,499
Foundation awards book prize	1,000	1,000
Total grants awarded	<u>158,745</u>	<u>220,255</u>

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2024

9 Grants awarded (continued)	2024	2023
	£	£
Reconciliation of grants payable		
Brought forward at 1 August 2023	-	-
New commitments made	-	-
Commitments paid	-	-
Carried forward at 31 July 2024	-	-
Recipient organisation - institutions		
Mildred Blaxter Post Doctoral Fellowship		
University of Oxford	34,146	-
University of Lincoln	23,534	25,295
Kings College London	-	44,002
University of Sheffield	50,835	22,876
Cardiff University	19,131	33,256
De Montfort University Leicester	-	39,956
Research grant development awards		
University of London	1,677	-
University of Leicester	-	28,928
Bath Spa University	-	5,513
University of Nottingham	-	2,400
University of Lancaster	-	5,658
Symposium and workshop awards		
University of Nottingham	2,066	-
University of Lincoln	2,500	-
University of Loughborough	2,040	3,000
University of Birmingham	5,493	2,445
Queen Mary University London	-	1,274
University of Sheffield	-	1,851
Kings College London	3,000	-
University of the West of England	2,297	-
Other		
Book Prize to the British Sociological Association	1,000	1,000
Post graduate international travel grants – 11 individuals (2023: 3)	11,026	2,801
	158,745	220,255

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2024

10 Creditors: amounts falling due within one year

	2024	2023
	£	£
Other taxation and social security	61,804	59,168
Accruals	42,222	50,085
	<u>104,026</u>	<u>109,253</u>

11 Analysis of movement in unrestricted reserves (General)

	£
At 1 August 2023	699,195
Transferred to designated funds	(117,202)
Surplus for the year	71,300
At 31 July 2024	<u>653,293</u>

12 Analysis of movement in unrestricted reserves (Designated)

	£
At 1 August 2023	326,300
Transferred from unrestricted general reserve	117,202
At 31 July 2024	<u>443,502</u>

The Charity has transferred £117,202 from the unrestricted general reserves to the unrestricted designated reserves for awards made during the year which were unclaimed at the year end (2023: £2,335 transferred from unrestricted designated reserves to unrestricted general reserves).

The fund is expected to be used to pay grants during the year ended 31 July 2025, with liquid resources available to meet these requirements.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2024

13 Related party transactions

There were no related party transactions during the current or preceding year.

FOUNDATION FOR THE SOCIOLOGY OF HEALTH AND ILLNESS

England & Wales - Charity number 1078203

Accounts

Company Number: 03835791
Charity Number: 1078203

**Foundation for the Sociology
of Health and Illness
(A company limited by Guarantee)**

Trustees' Report and Financial Statements

For the Year Ended 31 July 2023

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Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Trustees' Report
For the Year Ended 31 July 2023

The trustees present their report and the financial statements for the year ended 31 July 2023, which 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 standards applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) issued by the Charities Act 2016 and the Companies Act 2006.

a) Reference and Administrative details of the Charity

Name	Foundation for the Sociology of Health and Illness
Charity Number	1078203
Company Number	03835791 (registered in England and Wales)
Trustees	Professor E C Annandale (Chair) Professor R Barbour (Treasurer) Professor S B Ziebland Professor J J Waring Professor J Green Professor E Speed Professor S L Hatch Doctor J Douglas Professor Tiago Moreira (appointed 15 November 2022)
Company Secretary	Malcolm Lynch Wrigleys Solicitors LLP 3 rd Floor, 3 Wellington Place, Leeds, West Yorkshire LS1 4AP
Registered Office	3 rd Floor, 3 Wellington Place Leeds, West Yorkshire LS1 4AP

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Trustees' Report
For the Year Ended 31 July 2023

Independent examiners	Saffery LLP Mitre House, North Park Road Harrogate HG1 5RX
Solicitors	Wrigleys Solicitors LLP 3 rd Floor, 3 Wellington Place Leeds, West Yorkshire LS1 4AP
Bankers	National Westminster Bank Plc 21 High Street, Llandaff, Cardiff CF5 2YT

b) Structure, governance and management

The governing document for the Foundation is the Memorandum and Articles of Association and the charity is constituted as a private company limited by guarantee. The company was incorporated on 3 September 1999, and its Articles of Association were amended by special resolutions dated 1 November 1999 and 9 September 2020.

The Governing Body currently consists of 9 trustees/directors. These are all senior researchers and academics who are, or have been, actively researching or teaching in the field. Trustees are appointed by the members and/or by the trustees. The individuals on page 1 were directors and trustees of the company during the year.

There is a minimum of five and a maximum of ten trustees, who may not be paid from the Charity.

The trustees are all members of the Foundation and have voting rights at the Annual General Meeting. All Editorial Board members of the Foundation's journal, *Sociology of Health and Illness*, are members of the Foundation and have voting rights at the Annual General Meeting of the Charity, which is held at the annual British Medical Sociology Conference in September. Up to five other members can be appointed at the discretion of the trustees.

The trustees meet formally at least three times a year to discuss strategy for the next year and take decisions. On-going debate is conducted via email and telephone conferencing.

On appointment, trustees are given an induction to the work of the charity and provided with the information necessary for them to perform their role successfully, including a copy of the charity's governing document, a copy of the recent annual report and accounts and the Charity Commission's guidance "CC3a – The Essential Trustee: An Introduction" (Crown Copyright 2008) and "Charities and Public Benefit: The Charity Commission's general guidance on public benefit" (Crown Copyright 2008).

Trustees' Report
For the Year Ended 31 July 2023

The major risks to which the charity is exposed have been reviewed and we are confident that our reserves policy is the most appropriate way to manage the most serious potential threat, namely sharp decline in our income from the profits of the journal.

c) Objectives and activities

The principal objective for which the Charity is established is to promote and improve for the public benefit social scientific research, education and scholarship in the field of the sociology of health and illness.

The main activities that the Foundation undertakes in pursuance of this aim are:

1. Publication of a journal, *Sociology of Health and Illness*;
2. Support for conferences, workshops and other educational activities;
3. Provision for individuals to participate in conferences, courses and other educational activities;
4. Provision of fellowships for post-doctoral early career researchers; and
5. The arrangement or support for research and activities related to research.

The trustees have given due consideration to Charity Commission published Guidance on the operation of the Public Benefit requirement.

d) Achievements and performance

The Foundation's Awards, 2022-23

Mildred Blaxter Post-Doctoral Fellowships.

There were five applications for Fellowships in 2022-2023. Five Fellowships were awarded in Spring 2023. These were to:

Eleanor Kashouris – University of Sussex – teleological diagnosis in urinary tract infection: professionals, publics and practices.

Dr Steven Markham – University of Oxford – improving men's individual and collective health and wellbeing through a social intervention; men's sheds.

Dr Georgia Clancy – University of Nottingham – maternity care choices, challenges and risks; sharing research and developing next steps.

Dr Fawn Harrad-Hyde – University of Leicester – developing sociological theories of risk; exploring risk work and escalation of care across professions/occupations, organisations and sectors.

Trustees' Report
For the Year Ended 31 July 2023

Lijiaozi Cheng – University of Sheffield – the historical semantics and lived narratives of suboptimal health; conceptualizing a concept.

Post Graduate International Conference Travel Grants

During the year eight applications for these awards were received by the Foundation (2022: 8). Eight awards were made this financial year (2022: 5).

Symposia & Workshops.

There were five applications received in 2022-23. In the prior year, 6 applications were received.

Research Grant Development Awards.

Five applications were received, three in Autumn 22 and two in Spring 23. Five RGDA awards were made this financial year:

1. David Griffiths – Uni of Surrey – contested intersex narratives in medicine, media and law.
2. Dr Benjamin Marent – University of Sussex Business School – therapeutic encounters with AI; sociological inquiries into current disruptions and future.
3. Dr Isaac Tuffour – University of Wolverhampton – mental health without borders; a multi sectorial approach to reduce stigma and discrimination against mental illness in Africa.
4. Christopher Matthews – Nottingham Trent University – caring for former athletes who live with neurological disorders.
5. Lexandra Hillman – University of Exeter – ageing, dementia and care.
6. David Smith – Anglia Ruskin University – UK/Philippines migrant nurse later career research network.

Trustees' Report
For the Year Ended 31 July 2023

e) Financial review

The deficit for the year amounted to £1,620 (2022: surplus of £53,110). At the year-end unrestricted reserves were £1,025,495 (2022: £1,027,115) of which £699,195 (2022: £698,480) represent unrestricted general reserves and £326,300 (2022: £328,635 represent unrestricted designated reserves.

f) Plans for future periods

As well as supporting the continuing work of the editorial team at the universities of Newcastle and Cardiff, the trustees will advertise and fund up to four Mildred Blaxter Fellowships, ten Post-Graduate travel awards, six Symposia/Workshops, and six Research Grant Development awards during the financial year 2024-25. Details of how to apply for the awards and closing dates for applications are made available on the Foundation's website.

g) Reserves policy

The trustees have reviewed the charity's needs for reserves in line with the guidance issued by the Charity Commission. It is the policy of the charity to carry forward sufficient funds in reserve to cover any shortfall to cover committed editorial expenses and research awards, were income to decline. The trustees consider a level of £200,000 to be appropriate for this purpose, and have reviewed this sum several times during the year. During the financial year the free reserves have been in excess of this amount and it is the aim of the trustees to pay out more grants to reduce these during the year to 31 July 2024.

Statement of trustees' responsibilities

The trustees (who are also directors of the Foundation for the Sociology of Health and Illness for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these 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 (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Trustees' Report
For the Year Ended 31 July 2023

- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Small companies exemption

This report has been prepared in accordance with the provisions applicable to companies entitled to the small companies exemption.

By order of the board



Professor Rose Barbour
Treasurer

Date: 28/02/2024

Independent Examiner's Report to the Members
For the Year Ended 31 July 2023

Independent examiner's report to the trustees of Foundation for the Sociology of Health and Illness

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 July 2023.

Respective responsibilities of trustees and examiner

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

Basis of independent examiner's report

My 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 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 you as 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

Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of The Institute of Chartered Accountants in England and Wales (ICAEW), which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
 2. the accounts do not accord with those records; or
-

Independent Examiner's Report (Continued)
For the Year Ended 31 July 2023

3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or

4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102).

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.

Signed:



Alison Robinson
ACA
Saffery LLP
Mitre House
North Park Road
Harrogate
HG1 5RX

Date: 28 February 2024

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Statement of Financial Activities
For the Year Ended 31 July 2023

	Notes	Unrestricted funds	
		2023	2022
		£	£
Income and endowments from:			
Charitable activities	3	355,838	338,156
Investments			
Bank interest receivable		1,601	78
Total		<u>357,439</u>	<u>338,234</u>
Expenditure on:			
Charitable activities	7		
Publishing		118,427	92,205
Grant making		220,255	171,793
Support costs		<u>20,377</u>	<u>21,126</u>
Total		<u>(359,059)</u>	<u>(285,124)</u>
Net Income / (expenditure)	2	(1,620)	53,110
Total funds brought forward		1,027,115	974,005
Total funds carried forward		<u><u>1,025,495</u></u>	<u><u>1,027,115</u></u>

All amounts relate to continuing operations.

There were no recognised gains or losses for the year other than those included in the statement of financial activities. The statement of financial activities incorporates an income and expenditure account.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Balance Sheet
For the Year Ended 31 July 2023

	Notes	2023 £	2022 £
Current assets			
Cash at bank and in hand		1,134,748	1,160,440
		<u>1,134,748</u>	<u>1,160,440</u>
Creditors: amounts falling due within one year	10	<u>(109,253)</u>	<u>(133,325)</u>
Total net assets		<u><u>1,025,495</u></u>	<u><u>1,027,115</u></u>
 The funds of the charity			
Unrestricted reserves - General	11	699,195	698,480
Unrestricted reserves - Designated	12	326,300	328,635
Total charity funds		<u><u>1,025,495</u></u>	<u><u>1,027,115</u></u>

For the year ended 31 July 2023 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476 of the Companies Act 2006.

These financial statements have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The notes on pages 11 to 17 form part of these financial statements.

Approved by the trustees for issue on 28/02/2024.

Rosaline S. Falkow.

.....
Professor R Barbour
Trustee

Company Registration No. 03835791

1 Accounting policies

(a) Basis of preparation of financial statements

These financial statements have been prepared under the historical cost convention, as modified by the revaluation of investments and investment properties, in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The financial statements of prior years were prepared in accordance with applicable accounting standards and complied with the Charities Act 2011. The trustees consider the Charities SORP (FRS 102) to be the appropriate reporting framework of the Charity and as such have chosen to prepare these financial statements in accordance with this framework.

The Foundation for the Sociology of Health and Illness meet the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy.

(b) Preparation of the accounts on a going concern basis

At the time of approving the financial statements, the trustees have considered forecasts and have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

(c) Fund accounting

As detailed in note 12 to the financial statements, the trustees have recognised an unrestricted designated fund for the balance of awards accepted during the year ended 31 July 2023 which remain unclaimed at the balance sheet date.

(d) Incoming resources - charitable activities

Incoming resources from charitable activities comprise royalties from the sale of journals. Income is recognised in line with the royalty income agreement.

(e) Expenditure

Grants are accounted for in the year in which a binding obligation arises. Where there is an intention to make a grant which will be payable in a future year, and which is subject to the fulfilment of appropriate terms and conditions, an accrual will not be made unless the conditions have been fulfilled by the balance sheet date or are dependent on an external event over which the Charity has no control. However, where conditions have been met, it is the Charity's policy that such grants are subject to the receipt and review of a satisfactory report before payment can proceed; therefore, no binding obligations will arise in respect of such commitments until the Charity has confirmed the relevant grant.

Notes to the financial statements
For the Year Ended 31 July 2023

The administration costs of the Charity are allocated to grant making activities. The amounts paid each year to the publishers include an allowance for administration.

Governance costs comprise fees payable to the Charity's independent examiner and expenses paid to trustees.

(f) Financial instruments

The Charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

(g) Critical accounting policies and key sources of estimate uncertainty

In the application of the company's accounting policies, the trustees are required to make judgments, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

There are no estimates and assumptions which have a significant risk of causing a material adjustment to the carrying amount of assets and liabilities.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2023

2 Net incoming resources for the period

Net incoming resources are stated after charging:

	2023 £	2022 £
Fees payable to the company's independent examiner for the independent examination of the annual accounts	6,500	6,000

3 Income from charitable activities

	2023 £	2022 £
Royalties received	355,838	338,156
Other income	-	-
	<u>355,838</u>	<u>338,156</u>

4 Trustees and employees

The trustees received £nil emoluments during the year (2022 - £nil). £1,593 was paid for expenses to trustees during the year (2022: £125). During the year the Charity had no directly employed staff. Administrative duties are carried out by the Treasurer of the Foundation.

5 Taxation

The charitable company is exempt from corporation tax on its charitable activities.

6 Status and control

The Foundation for the Sociology of Health and Illness is a company limited by guarantee, not having a share capital. The liability of members is limited to £1. At 31 July 2023, the company had 9 members (2022 - 10) who controlled the company.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2023

7 Analysis of expenditure on charitable activities

	Activities Undertaken directly £	Grant funding of activities £	Support costs £	2023 Total £	2022 £
Publishing costs	118,427	-	-	118,427	92,205
Grant making (note 9)	-	220,255	-	220,255	171,793
Support costs	-	-	20,377	20,377	21,126
	<u>118,427</u>	<u>220,255</u>	<u>20,377</u>	<u>359,059</u>	<u>285,124</u>

8 Support costs

	Charitable activities		Basis
	2023 £	2022 £	
Legal fees	11,169	14,511	Direct allocation
Governance	7,615	6,490	Direct allocation
Travel and subsistence	1,593	125	Direct allocation
Total support costs	<u>20,377</u>	<u>21,126</u>	

9 Grants awarded

Details of the awards are given below:

	2023 £	2022 £
Post graduate international travel grants	2,801	2,656
Mildred Baxter Post Doctoral Fellowship	165,385	89,981
Symposium and workshop awards	8,570	2,130
Research grant development awards	42,499	76,026
Foundation awards book prize	1,000	1,000
Total grants awarded	<u>220,255</u>	<u>171,793</u>
Allocated support costs (note 8)	-	-
	<u>220,255</u>	<u>171,793</u>

9 Grants awarded (continued)

2023 £	2022 £
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Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2023

Reconciliation of grants payable

Brought forward at 1 August 2022	-	24,196
New commitments made	-	-
Commitments paid	-	(24,196)
Carried forward at 31 July 2023	-	-

Recipient organisation - institutions

Mildred Baxter Post Doctoral Fellowship

University of Oxford	-	20,306
University of Bristol	-	24,196
University of Hertfordshire	-	45,479
University of Lincoln	25,295	-
Kings College London	44,002	-
University of Sheffield	22,876	-
Cardiff University	33,256	-
De Montfort University Leicester	39,956	-

Research grant development awards

Loughborough University	-	4,363
University of Strathclyde	-	4,346
University of Essex	-	5,835
University of Oxford	-	26,649
University of Exeter	-	11,102
Cambridge University	-	23,731
University of Leicester	28,928	-
Bath Spa University	5,513	-
University of Nottingham	2,400	-
University of Lancaster	5,658	-

Symposium and workshop awards

Cambridgeshire and Peterborough NHS FT	-	960
Cambridge University	-	1,170
University of Loughborough	3,000	
University of Birmingham	2,445	
Queen Mary University London	1,274	
University of Sheffield	1,851	

Other

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2023

Book Prize to the British Sociological Association	1,000	1,000
Post graduate international travel grants – 3 individuals (2022: 4)	2,801	2,656
	<u>220,255</u>	<u>171,793</u>

10 Creditors: amounts falling due within one year

	2023	2022
	£	£
Other taxation and social security	59,168	102,076
Accruals and deferred income	50,085	31,249
	<u>109,253</u>	<u>133,325</u>

11 Analysis of movement in unrestricted reserves (General)

	£
At 1 August 2022	698,480
Transferred from designated funds	2,335
Surplus for the year	(1,620)
At 31 July 2023	<u>699,195</u>

12 Analysis of movement in unrestricted reserves (Designated)

	£
At 1 August 2022	328,635
Transferred to unrestricted general reserve	(2,335)
At 31 July 2023	<u>326,300</u>

The Charity has transferred £2,335 from the unrestricted designated reserves to the unrestricted general reserves for awards made during the year which were unclaimed at the year end (2022: £40,413 transferred from unrestricted general reserves to unrestricted

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2023

designated reserves).

The fund is expected to be used to pay grants during the year ended 31 July 2024, with liquid resources available to meet these requirements.

13 Related party transactions

There were no related party transactions during the current or preceding year.

FOUNDATION FOR THE SOCIOLOGY OF HEALTH AND ILLNESS

England & Wales - Charity number 1078203

Accounts

Company Number: 03835791
Charity Number: 1078203

**Foundation for the Sociology
of Health and Illness
(A company limited by Guarantee)**

Trustees' Report and Financial Statements

For the Year Ended 31 July 2022

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Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Trustees' Report
For the Year Ended 31 July 2022

The trustees present their report and the financial statements for the year ended 31 July 2022, which 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 standards applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) issued by the Charities Act 2016 and the Companies Act 2006.

a) Reference and Administrative details of the Charity

Name	Foundation for the Sociology of Health and Illness
Charity Number	1078203
Company Number	03835791 (registered in England and Wales)
Trustees	Professor E C Annandale (Chair) Professor R Barbour (Treasurer) Professor S J Nettleton Professor L F Monaghan Professor S B Ziebland Professor J J Waring Professor J Green Professor E Speed Professor S L Hatch (Appointed 14 September 2021) Doctor J Douglas (Appointed 20 January 2022)
Company Secretary	Malcolm Lynch Wrigleys Solicitors LLP 3 rd Floor, 3 Wellington Place, Leeds, West Yorkshire LS1 4AP
Registered Office	3 rd Floor, 3 Wellington Place Leeds, West Yorkshire LS1 4AP

Trustees' Report
For the Year Ended 31 July 2022

Independent examiners	Saffery Champness LLP Mitre House, North Park Road Harrogate HG1 5RX
Solicitors	Wrigleys Solicitors LLP 3 rd Floor, 3 Wellington Place Leeds, West Yorkshire LS1 4AP
Bankers	National Westminster Bank Plc 21 High Street, Llandaff, Cardiff CF5 2YT

b) Structure, governance and management

The governing document for the Foundation is the Memorandum and Articles of Association and the charity is constituted as a private company limited by guarantee. The company was incorporated on 3 September 1999, and its Articles of Association were amended by special resolutions dated 1 November 1999 and 9 September 2020.

The Governing Body currently consists of ten trustees/directors. These are all senior researchers and academics who are, or have been, actively researching or teaching in the field. Trustees are appointed by the members and/or by the trustees. The individuals on page 1 were directors and trustees of the company during the year.

There is a minimum of five and a maximum of ten trustees, who may not be paid from the Charity.

The trustees are all members of the Foundation and have voting rights at the Annual General Meeting. All Editorial Board members of the Foundation's journal, *Sociology of Health and Illness*, are members of the Foundation and have voting rights at the Annual General Meeting of the Charity, which is held at the annual British Medical Sociology Conference in September. Up to five other members can be appointed at the discretion of the trustees.

The trustees meet formally at least three times a year to discuss strategy for the next year and take decisions. On-going debate is conducted via email and telephone conferencing.

On appointment, trustees are given an induction to the work of the charity and provided with the information necessary for them to perform their role successfully, including a copy of the charity's governing document, a copy of the recent annual report and accounts and the Charity Commission's

Trustees' Report
For the Year Ended 31 July 2022

guidance "CC3a – The Essential Trustee: An Introduction" (Crown Copyright 2008) and "Charities and Public Benefit: The Charity Commission's general guidance on public benefit" (Crown Copyright 2008).

The major risks to which the charity is exposed have been reviewed and we are confident that our reserves policy is the most appropriate way to manage the most serious potential threat, namely sharp decline in our income from the profits of the journal.

c) Objectives and activities

The principal objective for which the Charity is established is to promote and improve for the public benefit social scientific research, education and scholarship in the field of the sociology of health and illness.

The main activities that the Foundation undertakes in pursuance of this aim are:

1. Publication of a journal, *Sociology of Health and Illness*, and associated monographs;
2. Support for conferences, workshops and other educational activities;
3. Provision for individuals to participate in conferences, courses and other educational activities;
4. Provision of fellowships for post-doctoral early career researchers; and
5. The arrangement or support for research and activities related to research.

The trustees have given due consideration to Charity Commission published Guidance on the operation of the Public Benefit requirement.

d) Achievements and performance

The Foundation's Awards, 2021-22

Mildred Blaxter Post-Doctoral Fellowships.

There were 8 applications for Fellowships in 2021-2022. Two Fellowships was awarded in Spring 2022 and two in Autumn 2021. These were to:

Kristine Fearon – De Montford University – Reproductive futures: social imaginaries and reproductive decision making in the context of chromosome disorders.

Hannah Cowan – Kings College London – Finding places to disrupt: intervening in the production of medical knowledge.

Joanna Blackwell – The University of Lincoln - Socio-cultural influences on exercise and health along the cardiac patient journey.

Trustees' Report
For the Year Ended 31 July 2022

Natalie Wotherspoon – University of Sheffield– Exploring the Contested Diagnosis of Chronic Fatigue Syndrome (CFS)/ Myalgic Encephalomyelitis (ME).

Post Graduate International Conference Travel Grants

During the year eight applications for these awards were received by the Foundation (2021: one). Five awards were made this financial year (2021: nil).

Symposia & Workshops.

There were six applications received in 2021-22. In the prior year, no applications were received.

Research Grant Development Awards.

Four applications were received, three in Autumn 21 and one in Spring 22. Three RGDA awards were made this financial year:

1. Andrew Smart – Bath Spa University – Race to recruit: Understanding racialisation in biomedical science by exploring the enrolment of racialised minorities to UK clinical research and health interventions.
2. Rachael Estham – Lancaster University – Capacity, context, and consent: a co-designed exploration of 'capacity' through the provision of longacting reversible contraception (LARC).
3. Dr China Mills – University of London – Mapping Global Mental Health: participatory research into the discourses, people, institutions, and money that make mental health global.

Trustees' Report
For the Year Ended 31 July 2022

e) Financial review

The surplus for the year amounted to £53,110 (2021: £191,271). At the year-end unrestricted reserves were £1,027,115 (2021: £974,005) of which £698,480 (2021: £685,783) represent unrestricted general reserves and £328,635 (2021: £288,222) represent unrestricted designated reserves.

f) Plans for future periods

As well as supporting the continuing work of the editorial team at the universities of Sussex and Brighton, the trustees will advertise and fund up to four Mildred Blaxter Fellowships, ten Post-Graduate travel awards, six Symposia/Workshops, and six Research Grant Development awards during the financial year 2022-23. Details of how to apply for the awards and closing dates for applications are made available on the Foundation's website.

g) Reserves policy

The trustees have reviewed the charity's needs for reserves in line with the guidance issued by the Charity Commission. It is the policy of the charity to carry forward sufficient funds in reserve to cover any shortfall to cover committed editorial expenses and research awards, were income to decline. The trustees consider a level of £200,000 to be appropriate for this purpose, and have reviewed this sum several times during the year. During the financial year the free reserves have been in excess of this amount and it is the aim of the trustees to pay out more grants to reduce these during the year to 31 July 2023.

Statement of trustees' responsibilities

The trustees (who are also directors of the Foundation for the Sociology of Health and Illness for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these 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 (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements; and

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Trustees' Report
For the Year Ended 31 July 2022

- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Small companies exemption

This report has been prepared in accordance with the provisions applicable to companies entitled to the small companies exemption.

By order of the board



Professor Rose Barbour
Treasurer

Date:
17/04/23

**Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)**

**Independent Examiner's Report to the Members
For the Year Ended 31 July 2022**

Independent examiner's report to the trustees of Foundation for the Sociology of Health and Illness

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 July 2022.

Respective responsibilities of trustees and examiner

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

Basis of independent examiner's report

My 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 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 you as 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

Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of The Institute of Chartered Accountants in England and Wales (ICAEW), which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or

Independent Examiner's Report (Continued)
For the Year Ended 31 July 2022

2. the accounts do not accord with those records; or

3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or

4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102).

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.

Signed:

A handwritten signature in black ink, appearing to read 'Alison Robinson'.

Alison Robinson
ACA
Saffery Champness LLP
Mitre House
North Park Road
Harrogate
HG1 5RX

Date: 24 April 2023

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Statement of Financial Activities
For the Year Ended 31 July 2022

	Notes	Unrestricted funds	
		2022	2021
		£	£
Income and endowments from:			
Charitable activities	3	338,156	357,466
Investments			
Bank interest receivable		78	20
Total		<u>338,234</u>	<u>357,486</u>
Expenditure on:			
Charitable activities	7		
Publishing		92,205	102,367
Grant making		171,793	56,395
Support costs		<u>21,126</u>	<u>7,453</u>
Total		<u>(285,124)</u>	<u>(166,215)</u>
Net Income / (expenditure)	2	53,110	191,271
Total funds brought forward		974,005	782,734
Total funds carried forward		<u>1,027,115</u>	<u>974,005</u>

All amounts relate to continuing operations.

There were no recognised gains or losses for the year other than those included in the statement of financial activities. The statement of financial activities incorporates an income and expenditure account.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Balance Sheet
For the Year Ended 31 July 2022

	Notes	2022 £	2021 £
Current assets			
Cash at bank and in hand		1,160,440	1,077,387
		<u>1,160,440</u>	<u>1,077,387</u>
Creditors: amounts falling due within one year	10	(133,325)	(103,382)
Total net assets		<u>1,027,115</u>	<u>974,005</u>
 The funds of the charity			
Unrestricted reserves - General	11	698,480	685,783
Unrestricted reserves - Designated	12	328,635	288,222
Total charity funds		<u>1,027,115</u>	<u>974,005</u>

For the year ended 31 July 2022 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476 of the Companies Act 2006.

These financial statements have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The notes on pages 11 to 17 form part of these financial statements.

Approved by the trustees for issue on 17 April 2023.

Rosaline S. Balkov

.....
Professor R Barbour
Trustee

Company Registration No. 03835791

Notes to the financial statements
For the Year Ended 31 July 2022

1 Accounting policies

(a) Basis of preparation of financial statements

These financial statements have been prepared under the historical cost convention, as modified by the revaluation of investments and investment properties, in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The financial statements of prior years were prepared in accordance with applicable accounting standards and complied with the Charities Act 2011. The trustees consider the Charities SORP (FRS 102) to be the appropriate reporting framework of the Charity and as such have chosen to prepare these financial statements in accordance with this framework.

The Foundation for the Sociology of Health and Illness meet the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy.

(b) Preparation of the accounts on a going concern basis

At the time of approving the financial statements, the trustees have considered forecasts and other events including the Coronavirus pandemic and have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

(c) Fund accounting

As detailed in note 12 to the financial statements, the trustees have recognised an unrestricted designated fund for the balance of awards accepted during the year ended 31 July 2022 which remain unclaimed at the balance sheet date.

(d) Incoming resources - charitable activities

Incoming resources from charitable activities comprise royalties from the sale of journals. Income is recognised in line with the royalty income agreement.

(e) Expenditure

Grants are accounted for in the year in which a binding obligation arises. Where there is an intention to make a grant which will be payable in a future year, and which is subject to the fulfilment of appropriate terms and conditions, an accrual will not be made unless the conditions have been fulfilled by the balance sheet date or are dependent on an external event over which the Charity has no control. However, where conditions have been met, it is the Charity's policy that such grants are subject to the receipt and review of a satisfactory

Notes to the financial statements
For the Year Ended 31 July 2022

report before payment can proceed; therefore, no binding obligations will arise in respect of such commitments until the Charity has confirmed the relevant grant.

The administration costs of the Charity are allocated to grant making activities. The amounts paid each year to the publishers include an allowance for administration.

Governance costs comprise fees payable to the Charity's independent examiner and expenses paid to trustees.

(f) Financial instruments

The Charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

(g) Critical accounting policies and key sources of estimate uncertainty

In the application of the company's accounting policies, the trustees are required to make judgments, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

There are no estimates and assumptions which have a significant risk of causing a material adjustment to the carrying amount of assets and liabilities.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2022

2 Net incoming resources for the period

Net incoming resources are stated after charging:

	2022	2021
	£	£
Fees payable to the company's independent examiner for the independent examination of the annual accounts	6,000	5,500

3 Income from charitable activities

	2022	2021
	£	£
Royalties received	338,156	352,466
Other income	-	5,000
	338,156	357,466

4 Trustees and employees

The trustees received £nil emoluments during the year (2021 - £nil). No expenses were paid for travel reimbursements to trustees during the year (2021: £nil). During the year the Charity had no directly employed staff. Administrative duties are carried out by the Treasurer of the Foundation.

5 Taxation

The charitable company is exempt from corporation tax on its charitable activities.

6 Status and control

The Foundation for the Sociology of Health and Illness is a company limited by guarantee, not having a share capital. The liability of members is limited to £1. At 31 July 2022, the company had ten members (2021 - ten) who controlled the company.

Notes to the financial statements
For the Year Ended 31 July 2022

7 Analysis of expenditure on charitable activities

	Activities Undertaken directly £	Grant funding of activities £	Support costs £	2022 Total £	2021 £
Publishing costs	92,205	-	-	92,205	102,367
Grant making (note 9)	-	171,793	-	171,793	56,395
Support costs	-	-	21,126	21,126	7,453
	<u>92,205</u>	<u>171,793</u>	<u>21,126</u>	<u>285,124</u>	<u>166,215</u>

8 Support costs

	Charitable activities		
	2022 £	2021 £	Basis
Legal fees	14,511	3,875	Direct allocation
Governance	6,615	6,703	Direct allocation
Financial administration	-	-	Direct allocation
Social media administration	-	750	Direct allocation
Total support costs	<u>21,126</u>	<u>11,328</u>	

9 Grants awarded

Details of the awards are given below:

	2022 £	2021 £
Post graduate international travel grants	2,656	767
Mildred Baxter Post Doctoral Fellowship	89,981	50,753
Symposium and workshop awards	2,130	-
Research grant development awards	76,026	-
Foundation awards book prize	1,000	1,000
Total grants awarded	<u>171,793</u>	<u>52,520</u>
Allocated support costs (note 8)	-	3,875
	<u>171,793</u>	<u>56,395</u>

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2022

9	Grants awarded (continued)	2022	2021
		£	£
	Reconciliation of grants payable		
	Brought forward at 1 August 2021	24,196	198
	New commitments made	-	24,196
	Commitments paid	(24,196)	(198)
	Carried forward at 31 July 2022	-	24,196
	Recipient organisation - institutions		
	Mildred Baxter Post Doctoral Fellowship		
	University of Oxford	20,306	-
	University of Bristol	24,196	-
	Queen Mary University of London	-	26,108
	University of Leicester	-	23,181
	University of Hertfordshire	45,479	1,464
	Research grant development awards		
	Loughborough University	4,363	-
	University of Strathclyde	4,346	-
	University of Essex	5,835	-
	University of Oxford	26,649	
	University of Exeter	11,102	
	Cambridge University	23,731	
	Symposium and workshop awards		
	Cambridgeshire and Peterborough NHS FT	960	-
	Cambridge University	1,170	
	Other		
	Book Prize to the British Sociological Association	1,000	1,000
	Post graduate international travel grants – 4 individuals (2021: 2)	2,656	767
		171,793	52,520

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2022

10 Creditors: amounts falling due within one year		
	2022	2021
	£	£
Other taxation and social security	102,076	59,637
Grants payable	-	-
Accruals and deferred income	31,249	43,745
	<u>133,325</u>	<u>103,382</u>

11 Analysis of movement in unrestricted reserves (General)

	£
At 1 August 2021	685,783
Transferred to designated funds	(40,413)
Surplus for the year	53,110
At 31 July 2022	<u>698,480</u>

12 Analysis of movement in unrestricted reserves (Designated)

	£
At 1 August 2021	288,222
Transferred from unrestricted general reserve	40,413
At 31 July 2022	<u>328,635</u>

The Charity has transferred £40,413 from the unrestricted general reserve to the unrestricted designated reserves for awards made during the year which were unclaimed at the year end (2021: £98,688 transferred from unrestricted general reserves to unrestricted designated reserves).

The fund is expected to be used to pay grants during the year ended 31 July 2023, with liquid resources available to meet these requirements.

13 Related party transactions

There were no related party transactions during the current or preceding year.

FOUNDATION FOR THE SOCIOLOGY OF HEALTH AND ILLNESS

England & Wales - Charity number 1078203

Accounts

Company Number: 03835791
Charity Number: 1078203

**Foundation for the Sociology
of Health and Illness
(A company limited by Guarantee)**

Trustees' Report and Financial Statements

For the Year Ended 31 July 2021

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Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Trustees' Report
For the Year Ended 31 July 2021

The trustees present their report and the financial statements for the year ended 31 July 2021, which 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 standards applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) issued by the charities act 2016 and the Companies Act 2006.

a) Reference and Administrative details of the Charity

Name	Foundation for the Sociology of Health and Illness
Charity Number	1078203
Company Number	03835791 (registered in England and Wales)
Trustees	Professor E C Annandale (Chair) Professor N J Busfield (Treasurer) (Resigned 7 September 2020) Professor S J Nettleton Professor S L Arber (Resigned 7 September 2020) Professor G P Martin (Resigned 9 September 2020) Professor L F Monaghan Professor S B Ziebland Professor J J Waring (Appointed 10 September 2020) Professor J Green (Appointed 10 September 2020) Professor R Barbour Professor E Speed (Appointed 10 September 2020) Doctor J Douglas (Appointed 20 January 2022) Professor S L Hatch (Appointed 14 September 2021)
Company Secretary	Malcolm Lynch Wrigleys Solicitors LLP 19 Cookridge Street, Leeds, West Yorkshire LS2 3AG
Registered Office	19 Cookridge Street Leeds, West Yorkshire LS2 3AG

Trustees' Report
For the Year Ended 31 July 2021

Independent examiners	Saffery Champness LLP Mitre House, North Park Road Harrogate HG1 5RX
Solicitors	Wrigleys Solicitors LLP 19 Cookridge Street Leeds, West Yorkshire LS2 3AG
Bankers	National Westminster Bank Plc 21 High Street, Llandaff, Cardiff CF5 2YT

b) Structure, governance and management

The governing document for the Foundation is the Memorandum and Articles of Association and the charity is constituted as a private company limited by guarantee. The company was incorporated on 3 September 1999, and its Articles of Association were amended by special resolutions dated 1 November 1999 and 9 September 2020.

The Governing Body currently consists of ten trustees/directors. These are all senior researchers and academics who are, or have been, actively researching or teaching in the field. Trustees are appointed by the members and/or by the trustees. The individuals on page 1 were directors and trustees of the company during the year.

There is a minimum of five and a maximum of ten trustees, who may not be paid from the Charity.

The trustees are all members of the Foundation and have voting rights at the Annual General Meeting. All Editorial Board members of the Foundation's journal, *Sociology of Health and Illness*, are members of the Foundation and have voting rights at the Annual General Meeting of the Charity, which is held at the annual British Medical Sociology Conference in September. Up to five other members can be appointed at the discretion of the trustees.

The trustees meet formally at least three times a year to discuss strategy for the next year and take decisions. On-going debate is conducted via email and telephone conferencing.

On appointment, trustees are given an induction to the work of the charity and provided with the information necessary for them to perform their role successfully, including a copy of the charity's governing document, a copy of the recent annual report and accounts and the Charity Commission's

Trustees' Report
For the Year Ended 31 July 2021

guidance "CC3a – The Essential Trustee: An Introduction" (Crown Copyright 2008) and "Charities and Public Benefit: The Charity Commission's general guidance on public benefit" (Crown Copyright 2008).

The major risks to which the charity is exposed have been reviewed and we are confident that our reserves policy is the most appropriate way to manage the most serious potential threat, namely sharp decline in our income from the profits of the journal.

c) Objectives and activities

The principal objective for which the Charity is established is to promote and improve for the public benefit social scientific research, education and scholarship in the field of the sociology of health and illness.

The main activities that the Foundation undertakes in pursuance of this aim are:

1. Publication of a journal, *Sociology of Health and Illness*, and associated monographs;
2. Support for conferences, workshops and other educational activities;
3. Provision for individuals to participate in conferences, courses and other educational activities;
4. Provision of fellowships for post-doctoral early career researchers; and
5. The arrangement or support for research and activities related to research.

The trustees have given due consideration to Charity Commission published Guidance on the operation of the Public Benefit requirement.

d) Achievements and performance

The Foundation's Awards, 2020-21

Mildred Blaxter Post-Doctoral Fellowships.

There were 11 applications for Fellowships in 2020-2021. Two Fellowships was awarded in Spring 2021 and two in Autumn 2020. These were to:

Georgia Smith - University of Exeter – The Long Night – A Sociological Exploration of Pharmaceutical Cultures of Sleep in Later Life.

Rhiannon Lane – Cardiff University – Negotiating diagnostic boundaries and psychiatric identities: a sociological study.

Trustees' Report
For the Year Ended 31 July 2021

Caitlin Pilbeam – Nuffield Department of Primary Care Health Sciences – Using Ethnographic Research to make Methodological, Empirical and Theoretical Contributions to the Medical Sociology of Death and Dying.

Jaime Garcia Iglesias – University of Edinburgh – Meanings of HIV: Developing new frameworks for HIV prevention and care.

Post Graduate International Conference Travel Grants

During the year one application for these awards was received by the Foundation (2020: ten). No awards were made this financial year (2020: six).

Symposia & Workshops.

There were no applications received in 2020-21. In the prior year, six applications were received, of which three were supported.

Research Grant Development Awards.

Three applications were received, one in Autumn 20 and two in Spring 21. All three RGDA awards were made this financial year:

1. Gill Green – University of Essex – Exploring access to healthcare with people and communities living on Traveller sites in the East of England.
2. Jennifer Remnant – University of Strathclyde – Lifting the lid: managing messy bodies at work.
3. Gareth Wiltshire – Loughborough University – Developing a social network-based illness self-management referral programme for organ transplant recipients.

Trustees' Report
For the Year Ended 31 July 2021

e) Financial review

The surplus for the year amounted to £191,271 (2020: £134,166). At the year-end unrestricted reserves were £974,005 (2020: £782,734) of which £685,783 (2020: £593,200) represent unrestricted general reserves and £288,222 (2020: £189,534) represent unrestricted designated reserves.

f) Plans for future periods

As well as supporting the continuing work of the editorial team at the universities of Sussex and Brighton, the trustees will advertise and fund up to four Mildred Blaxter Fellowships, ten Post-Graduate travel awards, six Symposia/Workshops, and four Research Grant Development awards during the financial year 2021-22. Details of how to apply for the awards and closing dates for applications are made available on the Foundation's website.

g) Reserves policy

The trustees have reviewed the charity's needs for reserves in line with the guidance issued by the Charity Commission. It is the policy of the charity to carry forward sufficient funds in reserve to cover any shortfall to cover committed editorial expenses and research awards, were income to decline. The trustees consider a level of £200,000 to be appropriate for this purpose, and have reviewed this sum several times during the year. During the financial year the free reserves have been in excess of this amount and it is the aim of the trustees to pay out more grants to reduce these during the year to 31 July 2022.

Going Concern: Covid-19

These accounts are being signed off during the Pandemic and the trustees have considered the impact on the charity of coronavirus. Given the current strength of the cash balance held the trustees continue to adopt the Going Concern basis of preparation in these financial statements.

Statement of trustees' responsibilities

The trustees (who are also directors of the Foundation for the Sociology of Health and Illness for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Trustees' Report
For the Year Ended 31 July 2021

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP (FRS 102);
- make judgements and estimates that are reasonable and prudent;
- state whether applicable 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 charity will continue in business.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Small companies exemption

This report has been prepared in accordance with the provisions applicable to companies entitled to the small companies exemption.

By order of the board



Professor Rose Barbour
Treasurer

Date: 7 April 2022

**Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)**

**Independent Examiner's Report to the Members
For the Year Ended 31 July 2021**

Independent examiner's report to the trustees of Foundation for the Sociology of Health and Illness

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 July 2021.

Respective responsibilities of trustees and examiner

As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

Basis of independent examiner's report

My 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 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 you as 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

Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of The Institute of Chartered Accountants in England and Wales (ICAEW), which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe:

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or

Independent Examiner's Report (Continued)
For the Year Ended 31 July 2021

2. the accounts do not accord with those records; or

3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or

4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102).

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.

Signed:

Alison Robinson

Alison Robinson
ICAEW
Saffery Champness LLP
Mitre House
North Park Road
Harrogate
HG1 5RX

Date: 7 April 2022

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Statement of Financial Activities
For the Year Ended 31 July 2021

	Notes	Unrestricted funds	
		2021	2020
		£	£
Income and endowments from:			
Charitable activities	3	357,466	365,138
Investments			
Bank interest receivable		20	339
Total		<u>357,486</u>	<u>365,477</u>
Expenditure on:			
Charitable activities	7		
Publishing		102,367	104,774
Grant making		56,395	112,763
Support costs		<u>7,453</u>	<u>13,774</u>
Total		<u>(166,215)</u>	<u>(231,311)</u>
Net Income / (expenditure)	2	191,271	134,166
Total funds brought forward		782,734	648,568
Total funds carried forward		<u>974,005</u>	<u>782,734</u>

All amounts relate to continuing operations.

There were no recognised gains or losses for the year other than those included in the statement of financial activities. The statement of financial activities incorporates an income and expenditure account.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Balance Sheet
For the Year Ended 31 July 2021

	Notes	2021 £	2020 £
Current assets			
Cash at bank and in hand		1,077,387	830,452
		<u>1,077,387</u>	<u>830,452</u>
Creditors: amounts falling due within one year	10	(103,382)	(47,718)
Total net assets		<u>974,005</u>	<u>782,734</u>
 The funds of the charity			
Unrestricted reserves - General	11	685,783	593,200
Unrestricted reserves - Designated	12	288,222	189,534
Total charity funds		<u>974,005</u>	<u>782,734</u>

For the year ended 31 July 2021 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476 of the Companies Act 2006.

These financial statements have been prepared in accordance with the special provisions relating to small companies within Part 15 of the Companies Act 2006.

The notes on pages 13 to 19 form part of these financial statements.

Approved by the trustees for issue on 7 April 2022.



.....
Professor R Barbour

Trustee

Company Registration No. 03835791

Notes to the financial statements
For the Year Ended 31 July 2021

1 Accounting policies

(a) Basis of preparation of financial statements

These financial statements have been prepared under the historical cost convention, as modified by the revaluation of investments and investment properties, in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) – (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The financial statements of prior years were prepared in accordance with applicable accounting standards and complied with the Charities Act 2011. The trustees consider the Charities SORP (FRS 102) to be the appropriate reporting framework of the Charity and as such have chosen to prepare these financial statements in accordance with this framework.

The Foundation for the Sociology of Health and Illness meet the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy.

(b) Preparation of the accounts on a going concern basis

At the time of approving the financial statements, the trustees have considered forecasts and other events including the Coronavirus pandemic and have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus, the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

(c) Fund accounting

As detailed in note 12 to the financial statements, the trustees have recognised an unrestricted designated fund for the balance of awards accepted during the year ended 31 July 2021 which remain unclaimed at the balance sheet date.

(d) Incoming resources - charitable activities

Incoming resources from charitable activities comprise royalties from the sale of journals. Income is recognised in line with the royalty income agreement.

(e) Expenditure

Grants are accounted for in the year in which a binding obligation arises. Where there is an intention to make a grant which will be payable in a future year, and which is subject to the fulfilment of appropriate terms and conditions, an accrual will not be made unless the conditions have been fulfilled by the balance sheet date, or are dependent on an external event over which the Charity has no control. However, where conditions have been met, it is the Charity's policy that such grants are subject to the receipt and review of a satisfactory

Notes to the financial statements
For the Year Ended 31 July 2021

report before payment can proceed; therefore, no binding obligations will arise in respect of such commitments until the Charity has confirmed the relevant grant.

The administration costs of the Charity are allocated to grant making activities. The amounts paid each year to the publishers include an allowance for administration.

Governance costs comprise fees payable to the Charity's independent examiner and expenses paid to trustees.

(f) Financial instruments

The Charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value.

(g) Critical accounting policies and key sources of estimate uncertainty

In the application of the company's accounting policies, the trustees are required to make judgments, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised where the revision affects only that period, or in the period of the revision and future periods where the revision affects both current and future periods.

There are no estimates and assumptions which have a significant risk of causing a material adjustment to the carrying amount of assets and liabilities.

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2021

2 Net incoming resources for the period

Net incoming resources are stated after charging:

	2021	2020
	£	£
Fees payable to the company's independent examiner for the independent examination of the annual accounts	5,500	5,500

3 Income from charitable activities

	2021	2020
	£	£
Royalties received	352,466	360,138
Other income	5,000	5,000
	<u>357,466</u>	<u>365,138</u>

4 Trustees and employees

The trustees received £nil emoluments during the year (2020 - £nil). No expenses were paid for travel reimbursements to trustees during the year (2020: £1,648). During the year the Charity had no directly employed staff. Administrative duties are carried out by the Treasurer of the Foundation.

5 Taxation

The charitable company is exempt from corporation tax on its charitable activities.

6 Status and control

The Foundation for the Sociology of Health and Illness is a company limited by guarantee, not having a share capital. The liability of members is limited to £1. At 31 July 2021, the company had ten members (2020 - eight) who controlled the company.

Notes to the financial statements
For the Year Ended 31 July 2021

7 Analysis of expenditure on charitable activities

	Activities Undertaken directly £	Grant funding of activities £	Support costs £	2021 Total £	2020 £
Publishing costs	102,367	-	-	102,367	104,774
Grant making (note 9)	-	52,520	3,875	56,395	112,763
Support costs	-	-	7,453	7,453	13,774
	<u>102,367</u>	<u>52,520</u>	<u>11,328</u>	<u>166,215</u>	<u>231,311</u>

8 Support costs

	Charitable activities		Basis
	2021 £	2020 £	
Legal fees	3,875	7,279	Direct allocation
Governance	6,703	7,115	Direct allocation
Financial administration	-	2,534	Direct allocation
Social media administration	750	4,125	Direct allocation
Total support costs	11,328	21,053	

9 Grants awarded

6 Grants were awarded in the year (2020: 11) to a total of 6 (2020: 11) individuals at 6 (2020: 11) institutions. Details of the awards are given below:

	2021 £	2020 £
Sponsorship	-	2,669
Post graduate international travel grants	767	2,279
Mildred Baxter Post Doctoral Fellowship	50,753	91,143
Symposium and workshop awards	-	8,393
Research grant development awards	-	-
Foundation awards book prize	1,000	1,000
Total grants awarded	52,520	105,484
Allocated support costs (note 8)	3,875	7,279
	<u>56,395</u>	<u>112,763</u>

Foundation for the Sociology of Health and Illness
(A company limited by Guarantee)

Notes to the financial statements
For the Year Ended 31 July 2021

9	Grants awarded (continued)	2021	2020
		£	£
	Reconciliation of grants payable		
	Brought forward at 1 August 2020	198	4,200
	New commitments made	24,196	-
	Commitments paid	(198)	(4,200)
	Carried forward at 31 July 2021	24,196	-
	Recipient organisation - institutions		
	Mildred Baxter Post Doctoral Fellowship		
	University of Bristol	-	22,411
	Kings College London	-	44,559
	Queen Mary University of London	26,108	24,173
	University of Leicester	23,181	-
	University of Hertfordshire	1,464	-
	Symposium and workshop awards		
	De Montfort University	-	1,727
	University of Sussex	-	2,052
	Cardiff University	-	2,263
	Lancaster University	-	2,351
	Other		
	Book Prize to the British Sociological Association	1,000	1,000
	Sponsorship of event	-	2,669
	Post graduate international travel grants – 2 individuals (2020: 3)	767	2,279
		52,520	105,484
10	Creditors: amounts falling due within one year	2021	2020
		£	£
	Other taxation and social security	59,637	18
	Grants payable	-	198
	Accruals and deferred income	43,745	47,502
		103,382	47,718

Notes to the financial statements
For the Year Ended 31 July 2021

11 Analysis of movement in unrestricted reserves (General)

	£
At 1 August 2020	593,200
Transferred to designated funds	(98,688)
Surplus for the year	191,271
At 31 July 2021	685,783

12 Analysis of movement in unrestricted reserves (Designated)

	£
At 1 August 2020	189,534
Transferred from unrestricted general reserve	98,688
At 31 July 2021	288,222

The Charity has transferred £98,688 from the unrestricted general reserve to the unrestricted designated reserves for awards made during the year which were unclaimed at the year end (2020: £18,996 transferred from unrestricted general reserves to unrestricted designated reserves).

The fund is expected to be used to pay grants during the year ended 31 July 2022, with liquid resources available to meet these requirements.

13 Related party transactions

There were no related party transactions during the current or preceding year.