

**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**

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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 <sup>rd</sup> Floor, 3 Wellington Place, Leeds, West Yorkshire LS1 4AP
Registered Office	3 <sup>rd</sup> Floor, 3 Wellington Place Leeds, West Yorkshire LS1 4AP

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Independent examiners	Saffery LLP Mitre House, North Park Road Harrogate HG1 5RX
Solicitors	Wrigleys Solicitors LLP 3 <sup>rd</sup> 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**  
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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.

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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**

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**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

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**Trustees' Report**  
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- 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**

*Rosaline S. Barbour.*

Professor Rose Barbour  
**Treasurer**

**Date:** 28/02/2024



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

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**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
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**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**

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**Statement of Financial Activities**  
**For the Year Ended 31 July 2023**

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

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**Balance Sheet**  
**For the Year Ended 31 July 2023**

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

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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

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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.

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

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**2 Net incoming resources for the period**

Net incoming resources are stated after charging:

	<b>2023</b> <b>£</b>	<b>2022</b> <b>£</b>
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**

	<b>2023</b> <b>£</b>	<b>2022</b> <b>£</b>
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.

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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
<b>Total support costs</b>	<u><b>20,377</b></u>	<u><b>21,126</b></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
<b>Total grants awarded</b>	<u><b>220,255</b></u>	<u><b>171,793</b></u>
Allocated support costs (note 8)	-	-
	<u><b>220,255</b></u>	<u><b>171,793</b></u>

9 Grants awarded (continued)

2023 £	2022 £
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**Notes to the financial statements**  
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**Reconciliation of grants payable**

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

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**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**

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**Notes to the financial statements**  
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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**

	<b>2023</b>	<b>2022</b>
	<b>£</b>	<b>£</b>
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)**

	<b>£</b>
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)**

	<b>£</b>
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

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**Notes to the financial statements**  
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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.