

THE PERNICIOUS ANAEMIA SOCIETY

England & Wales · Charity number 1147839

Details

Status	Registered
Legal form	Charitable company
Company number	07904047
Registered	2012-06-26
Register	View on the Charity Commission register

Contact

Address	Connexions 3rd Floor 159 Princes Street Ipswich IP1 1QJ
Phone	01656769717
Email	treasurer@pasoc.org.uk
Website	www.pernicious-anaemia-society.org.uk

Activities

Objects: (1) PROMOTE AND PROTECT THE PHYSICAL AND MENTAL HEALTH OF SUFFERERS OF PERNICIOUS ANAEMIA THROUGH THE PROVISION OF SUPPORT, EDUCATION AND PRACTICAL ADVICE.(2) ADVANCE THE EDUCATION OF THE PUBLIC IN ALL AREAS RELATING TO PERNICIOUS ANAEMIA.(3) PROMOTE RESEARCH INTO THE CAUSE AND TREATMENT OF PERNICIOUS ANAEMIA, AND INTO THE IMPLICATIONS OF PERNICIOUS ANAEMIA ON OTHER MEDICAL CONDITIONS, FOR THE PUBLIC BENEFIT.

Activities: 1. Promote and protect the physical and mental health of sufferers of Pernicious Anaemia through the provision of support, education and practical advice.2. Advance the education of the general public in all areas relating to Pernicious Anaemia.3. Promote and Participate in research into the causes and treatment of Pernicious Anaemia for the public benefit.

Classification

- **How:** Provides Human Resources, Provides Services, Provides Advocacy/advice/information, Sponsors Or Undertakes Research, Acts As An Umbrella Or Resource Body
- **What:** Education/training, The Advancement Of Health Or Saving Of Lives
- **Who:** Elderly/old People, People With Disabilities, The General Public/mankind

Geography

- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£57,682	£44,650	-	-
2024-03-31	£42,652	£63,065	-	-
2023-03-31	£44,676	£94,182	-	-
2022-03-31	£48,013	£62,646	-	-
2021-03-31	£46,939	£42,787	-	-

Trustees

Name	Role	Appointed
Andrew Axford		2025-09-13
Andy Emerson		2023-09-16
Dr JOHN PELHAM WARREN		2022-09-10
Elizabeth Oliver Smart		2022-09-10
Julie Wichlin		2025-09-13
Stephen Ganter		2020-09-12
THERESA BERTA KATE TAYLOR		2012-03-29
Tara Tierney		2023-09-16

THE PERNICIOUS ANAEMIA SOCIETY

England & Wales - Charity number 1147839

Accounts

Company number **7904047 (England and Wales)**

Charity number **1147839**

THE PERNICIOUS ANAEMIA SOCIETY

Financial Statements
For the year ended 31st March 2025

THE PERNICIOUS ANAEMIA SOCIETY

Financial Statements For the year ended 31st March 2025

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THE PERNICIOUS ANAEMIA SOCIETY

REFERENCE AND ADMINISTRATIVE INFORMATION

Charity Name	The Pernicious Anaemia Society
Charity registration number	1147839
Company registration number	7904047
Registered Office and operational address	Connexions 3rd Floor 159 Princes Street Ipswich IP1 1QJ

Trustees

Chair	Elizabeth Smart	
	Theresa Berta Taylor	
	Stephen Ganter	
	Dr John Pelham Warren	
	Tara Tierney	
	Andrew Emerson	
	David Connell- Smith	(retired 30 September 2024)
	Alex David	(retired 30 September 2024)

Management Committee

Chief Executive Officer	Katrina Burchell
	Karyl Carter
	Nicola Finck

Company Secretary	Nicola Finck
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Independent Examiner	H Rumsey FCA,Dch A Ensors Chartered Accountants Connexions, 159 Princes Street Ipswich IP1 1QJ
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Bankers	National Westminster Bank Plc 28 Adare Street Bridgend CF31 1EN
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THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2025

The trustees present their report and the unaudited financial statements of the charity for the year ended 31 March 2025. The details on page one form part of this report.

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity's governing document, the Charities Act 2011 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 the Republic of Ireland (FRS102)'. They are also prepared in accordance with the Companies Act 2006.

OBJECT OF THE CHARITY

To promote and protect the physical and mental health of sufferers of pernicious anaemia.
Advance the education of the general public in all areas relating to pernicious anaemia.
Promote and participate in research into the causes and treatment of pernicious anaemia.

PUBLIC BENEFIT

The trustees are aware of the Charity Commission's guidance in relation to delivering public benefit and believe the charity is fulfilling its requirements.

REVIEW OF THE YEAR - Chair's and Chief Executive Officer's reports

see pages 3 to 10

THE PERNICIOUS ANAEMIA SOCIETY
Report of the Trustees for the year ended 31 March 2025

Chair of Trustees Annual Report

Our main activities are to promote and participate in research into the causes and treatment of Pernicious Anaemia to improve the diagnosis and treatment of the condition.

We are focused on our service users. Our ethos reflects this, and we concentrate on the dignity of individuals who have the right to participate in the design and monitoring of their treatment.

Trustees are identified by the executive and are invited to produce a CV. Final selection is made by the Board of Trustees. On appointment, all the Trustees are issued guidance by the Charity Commission on public benefit and are required to read and accept the PAS Code of Conduct for Trustees.

The contribution made by volunteers is substantial. All the work of the Society is carried out by volunteers. The small group who form the Executive carry out the majority of the work of the Society which is substantial including responding to email enquiries from members. The helpline and support group volunteers along with the Trustees are all committed to the aims of the Society. Further, the Trustees aim to help with the Society's new business plan e.g. fundraising, supporting the finance manager, writing blogs etc.

The Society, despite its size has achieved much in the previous year and more details on this can be found in the CEO's report below.

The Charity's financial position at the end of the period. We are pleased to report that the hard work of all our team, combined with the support of our members has led us to finish our financial year in 2025 in a stronger position than we were in 2024. We will continue to concentrate our focus on fundraising to meet the commitment we have to supporting research and meeting our objectives.

CHIEF EXECUTIVE OFFICER'S REPORT

This last year we have been putting into place the action points from the business plan drafted in 2024, most significantly we have focussed on education and awareness with fundraising to help support our activities.

The business plan and our new structure of the Trustee board, CEO and Management Committee is working well in delivering a professionally run Charitable organisation. Tasks and roles have been prioritised and clarified, and the Charity is beginning to see the benefit of this new structure and depth of organisation.

Having overhauled our financial structure and focussed on priorities and areas for fundraising, we are working now with a more transparent and clearer financial budget and plan.

We finalised all the work to make us compliant with employment regulations for our one employee, updated all our policies and procedures documents for our volunteers and members and ensured we were compliant with everything a charity needs to do to run with integrity and professionalism. We have a few steps left to complete regarding contracts for freelance services but I'm confident that we are in a much better position now than we were 12 months ago.

THE PERNICIOUS ANAEMIA SOCIETY
Report of the Trustees for the year ended 31 March 2025

CHIEF EXECUTIVE OFFICER'S REPORT (continued)

RESEARCH AND JAMES LIND ALLIANCE PRIORITY SETTING PARTNERSHIP ON PERNICIOUS ANAEMIA

The Top Ten uncertainties identified by the Priority Setting Partnership with the James Lind Alliance remain a core priority for the Society and we have made further strides into some of the key questions. The PhD student at Norwich University Quadram Institute who we are supporting is reporting back to us on her progress and our PhD student at the University of Surrey has worked on some important research surveys and published results. We also supported DeMontfort University's research into NICE and Experience One Year On and hope to see the results of that research reported or published soon.

We continue to work with numerous other research bodies looking for other opportunities for further research in this area and have had constructive conversations with many which we will continue to look for funding for. We have actively engaged with three new research projects which we will be working on during 2025 and 2026.

We introduced a new section on our Website entitled "Research" where we are posting about our research projects and using our resources on knowledge management and experts to review and comment on relevant research. For example, a review and comment on research on Restless Legs and B12 was published on our website and proved popular reading.

EDUCATION AND AWARENESS

Our helpdesk enquiries and social media engagement suggest that NICE Guidelines have not made a positive impact on the diagnosis and treatment of Pernicious Anaemia. In fact, in some instances in the UK the very existence of the publicity around the Guideline has led to even more negative experiences for many of our members. We continue to prepare and upload to our website and social media information to help our members deal with these challenges, but this is an area of concern.

We are working on education material for GPs and Healthcare professionals and for patients which we hope will contribute to better understanding and more constructive conversations. With the support of the B12 Alliance, PAS hope to have a Westminster Reception in 2026 to raise awareness of the issues in enabling patients to control their own health and frequency via self-injection and for Government to put pressure on the health care profession to improve training and awareness in this area.

We have had a few new healthcare professionals join the Society who are actively involved in helping us with ensuring our material is professionally reviewed and providing us with insight on how we can support patients and health care professionals alike with information about Pernicious Anaemia and B12 deficiency.

During this reporting year we commenced our series of seminars aimed at patients, health care professionals and researchers on topics relating to B12 deficiency and Pernicious Anaemia. The purpose of this was to put out quality material which would be recorded and serve as a valuable resource for new and potential members of the Society. By making a small charge for these seminars to cover our costs for hosting, video storage subscriptions and maintaining our website, we have been able to put on a varied and rich programme of online events which are accessible to many regardless of location or time zone. These sessions have been extremely popular, and we plan to continue with further sessions in the coming year.

THE PERNICIOUS ANAEMIA SOCIETY
Report of the Trustees for the year ended 31 March 2025
CHIEF EXECUTIVE OFFICER'S REPORT (continued)

CLUB-12, THE B-12 ALLIANCE AND OTHER ORGANISATIONS

CluB-12 is a not-for-profit organisation consisting of scientists, researchers and clinicians who regularly discuss issues relating to B12 not limited to Pernicious Anaemia and B12 deficiency. Our involvement with CluB-12 continues and I regularly attend the twice monthly meetings of the wider organisation and the research meetings of the PA sub-group. During 2023 the B12-Alliance was formed which is a group representing the not-for-profit patient advocacy sector and I was appointed the first chair and host a monthly online meeting where the patient advocacy groups meet and share resources where appropriate. Working together with other organisations gives us the opportunity to speak with a louder voice in some instances but still enables us to speak to our own specific issues under the banner of our own organisation. The B12-Alliance has an Education Programme working group which is working on the Education programme for the Health Care Professionals on B12 Deficiency including Pernicious Anaemia, this is going to be vitally important for doctors, healthcare workers and patients alike.

We work with numerous other organisations including the Neurological Alliance, The Prescriptions Coalition and several professional individuals who contact us for information, support and advice about Pernicious Anaemia or who are conducting their own research which might benefit our members. We carefully consider all requests to ensure they are aligned with our mission and the requirements of a UK registered charity. We have responded to questions from MPs whose constituents have contacted them about their condition and their treatment in their constituencies and spoken at length to journalists about the NICE guidelines which culminated in an ITV news story about B12 deficiency where Pernicious Anaemia was specifically mentioned. I attended the Cambridge Symposium organised by CluB-12 in September 2024 where I had been invited to speak as CEO of PAS and Chair of the B-12 Alliance on the Education Programme for Health Care Professionals

PA DAY and FUNDRAISING

In 2023 we introduced in a low-key way, the concept of a day specifically recognising Pernicious Anaemia and settled on 12th October 2023. In 2024 we made a little more noise on social media and one of our supporters organised a fundraising event in the form of a craft fair which was extremely successful and raised both local awareness and much needed funds for the Society.

Our trustees Andy and Tara applied for a few grants which resulted in funds from the Postcode Lottery and the Hospital Saturday Fund. We are learning a lot from the process and will continue in line with our business plan to try to get additional funding in this way so that we can work towards more of our goals.

Like many small charities we are struggling for regular funding and rely heavily on donations and membership fees. By raising awareness of this in the last year I am pleased to report that we have seen an increase in membership and regular donations. The Society has also been the recipient of some generous donations from people we have helped during the diagnosis and treatment journey through our help desk. We need to continue working on this as we still have research projects to fund in the 2026 and 2027 budgets.

The charity is staffed by one permanent part time employee and the rest are volunteers. Costs for running a charity are increasing and the more we want to do to raise awareness and support our members the more we must invest.

THE PERNICIOUS ANAEMIA SOCIETY
Report of the Trustees for the year ended 31 March 2025
CHIEF EXECUTIVE OFFICER'S REPORT (continued)

MANAGEMENT COMMITTEE

During the last financial year, the management committee has been focussed on the prioritised tasks in the Business Plan. Many of these tasks now have moved from internal re-organisation and reviews to working on more patient facing activities including updating the website, engaging speakers and bloggers for our seminars and blog posts, looking for opportunities for research projects and lobbying government for change. Writing to the Chief Medical Officers and Chief Nursing Officers, government ministers and relevant organisations; providing letters of support for members, ensuring information on our website is up to date and medically reviewed, working on our Pernicious Anaemia Society education programme have been key areas where we have started to see some changes as a result.

We are very lucky to have office space in Bridgend which the landlord provides to us free of charge. However, as this is his business he sometimes needs us to move to other accommodation and unfortunately during the last year this has meant 3 moves to different floors in the same building. This is time consuming and physically demanding although the landlord and his team have been very supportive and helpful. As a result, we have decided to conduct a full review of what we have in this office space, what our needs are in the future and ensure that we have the minimum physical files so that any future moves to a different office space can involve less physical work.

SOCIAL MEDIA, NEWSLETTER, SEMINARS

Our social media policy is regularly reviewed with our service provider and has been successful in increasing awareness, membership and our reputation. This year we focussed on trying to reach different audiences by trialling different topics and styles of posts. We also held themed monthly activities such as men's health and PA in November 2024 and PA and Stress in December 2024. We continue to post on LinkedIn and engage with researchers, health care professionals, journalists and other patient advocacy groups and charities.

Our newsletter content continues to go from strength to strength, and we have worked hard this year on improving the content and format with the help of Megan, one of our volunteers. Although the initial series of blog posts was only for one year, we continued this theme into this last year and these continue to be well received, and people now approach us to volunteer writing a blog. We have also received more personal stories from members which are always a big hit in our newsletter and online.

We held our annual Seminar on 12th October 2024 and made a small charge for attendance; it was well attended, and we received lots of positive feedback about the research updates and quality of the speakers.

SUPPORT GROUPS AND HELP DESK

Karyl, our office manager also volunteers as our support group and volunteer co-ordinator and does a fantastic job ensuring that they remain engaged and trained. Karyl also mans the helpline and email helpdesk. We have been discussing investing in a better customer records management system for our membership and help desk to improve the experience for those calling for help and the volunteers and hope to conclude our review on our options shortly.

THE PERNICIOUS ANAEMIA SOCIETY
Report of the Trustees for the year ended 31 March 2025
CHIEF EXECUTIVE OFFICER'S REPORT (continued)

WEBSITE, IT AND SHOP

Petra has been updating our website material on an ongoing basis and improving the layout and navigation. There is still more work to do, and we are hoping to introduce more information in different formats including video shortly.

Our shop has been a success and although we still only offer a limited range we have a steady stream of customers. The purchase of recorded seminars is very popular. We continue to look for other options for products or collaborations we could have as merchandise.

THE FUTURE

In my report this time last year I shared some concerns about the future for the Society which needed to be on a more sound financial footing but I'm pleased to report that this year has seen us address these concerns and the Business Plan is beginning to steer a clear path for the future.

THANK YOU

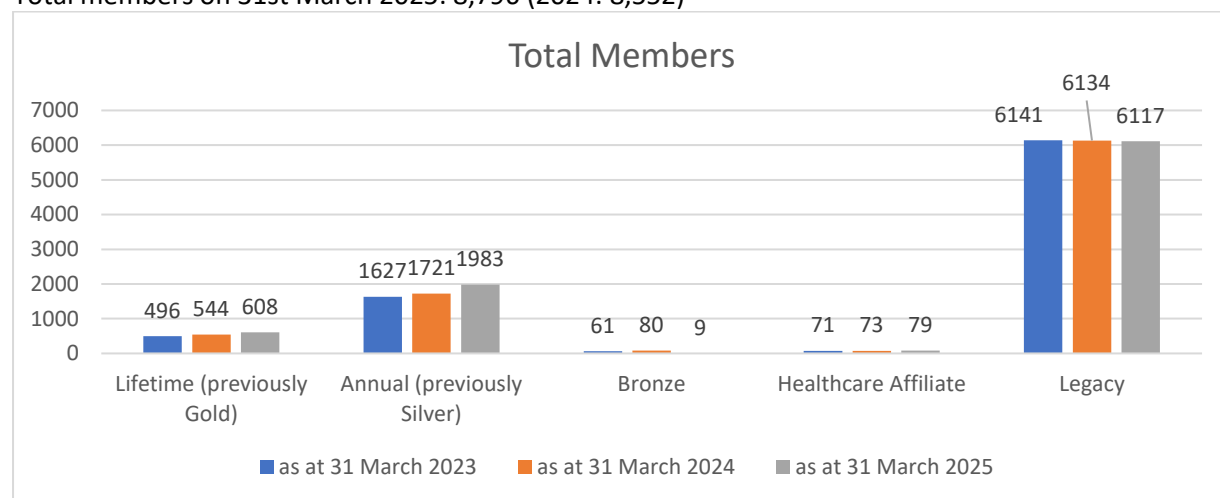
I'm grateful to the Chair and the trustees who have provided wise counsel. I'm especially indebted to Andy and Tara who have gone above and beyond contributing their time for grant applications and to Liz who helped so much with the Policy reviews. The management team of Nicola, Karyl and myself and Petra who supports us on IT and Membership work well together and I'm indebted to them for their constant enthusiasm and willingness to give up their time energy and support often while battling their own health issues and personal circumstances.

Katrina Burchell
ceo@pasoc.org.uk

THE PERNICIOUS ANAEMIA SOCIETY
Report of the Trustees for the year ended 31 March 2025
CHIEF EXECUTIVE OFFICER'S REPORT (continued)

Membership

Total members on 31st March 2025: 8,796 (2024: 8,552)

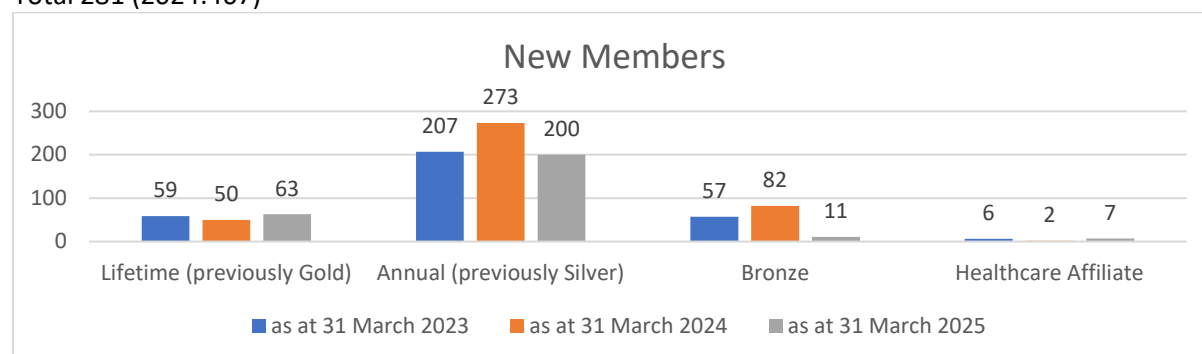


²Legacy members are those who joined with a lifetime fee of £20. They do not incur any annual membership renewal fee.

Bronze membership is no longer open to new members.

New members 01.04.24 - 31.03.25

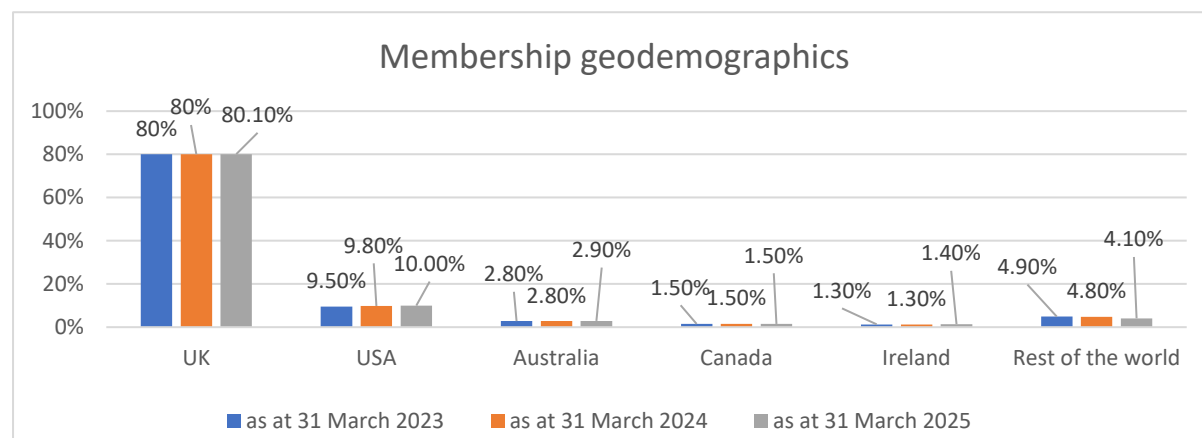
Total 281 (2024:407)



HCA = Healthcare Professional Affiliates. HCA's are offered free membership if they are currently treating or working with patients with Pernicious Anaemia.

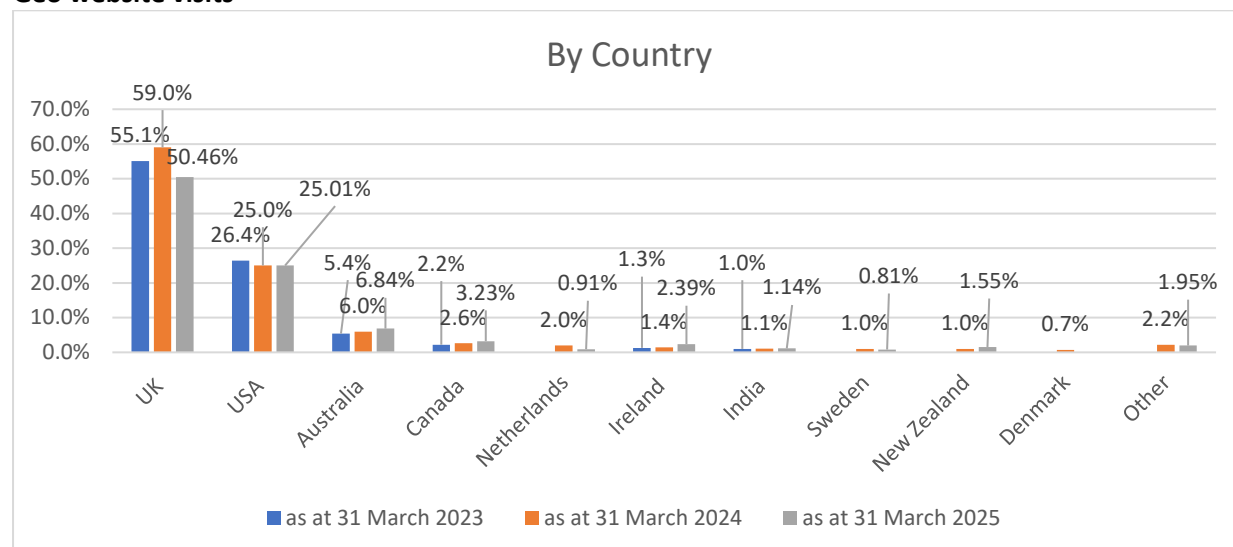
Bronze membership is no longer open to new members.

GEODEMOGRAPHICS



THE PERNICIOUS ANAEMIA SOCIETY
Report of the Trustees for the year ended 31 March 2025
CHIEF EXECUTIVE OFFICER'S REPORT (continued)

Geo website visits



Website analytics

User Analytics			
	as at 31 March 2023	as at 31 March 2024	as at 31 March 2025
Page Views	299,524	No data available	330,000
Users	102,805	98,000	113,009
New Users	92%	No data available	99%
Sessions	137,509	No data available	168,246
Average Session Duration	00:02:36	00:02:53	00:03:40
Pages/Session	2.18	2.26	1.96

How did they find us?

	as at 31 March 2023	as at 31 March 2024	as at 31 March 2025
Organic Search	75%	57.80%	61.99%
Direct	18%	22.30%	26.54%
Social Media	3%	15%	7%
Referral from other sites	4%	4.9%	4.3%
Organic Video	No data available	No data available	0.2%

Most visited website pages:

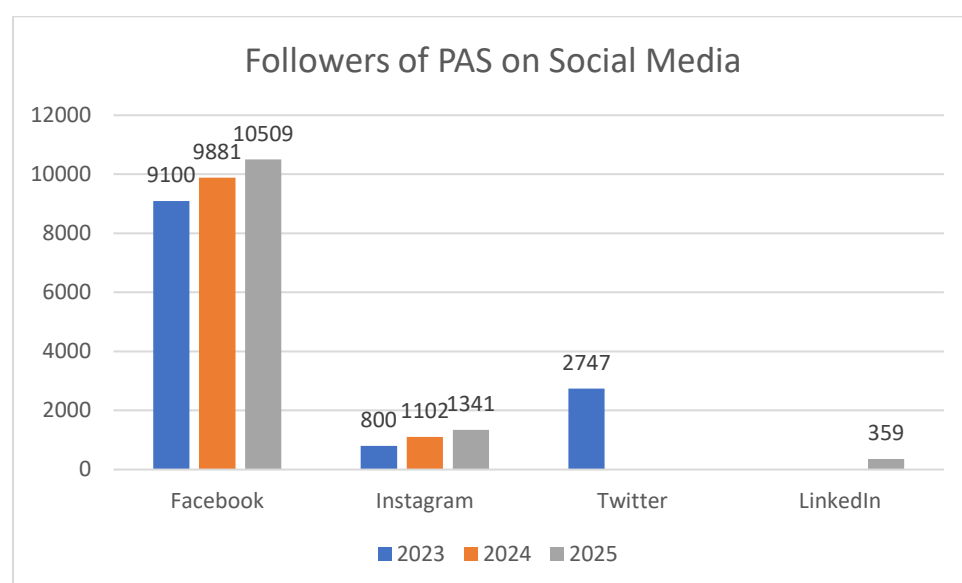
- 1 Homepage
- 2 Symptoms
- 3 Testing for Pernicious Anaemia
- 4 What is Pernicious Anaemia?
- 5 B12 deficiency and pernicious anaemia
- 6 Treatment
- 7 Diagnosis
- 8 Symptom checklist
- 9 Who is most at risk
- 10 Personal stories

THE PERNICIOUS ANAEMIA SOCIETY
Report of the Trustees for the year ended 31 March 2025
CHIEF EXECUTIVE OFFICER'S REPORT (continued)

Social Media

Overall Top Performing Content 2025

- 1 B12 deficiency: why aren't doctors following the guidelines
- 2 Interesting read: Vitamin B12 deficiency can be life-threatening
- 3 Anaemia awareness hands up for blood health
- 4 Cobalamin Deficiency: also known as B12 deficiency
- 5 Jimmy's story
- 6 Understanding the many causes of B12 deficiency



The Future

The new financial year will be about building on our successes of last year, including providing more of the fascinating, knowledge sharing seminars which have been so well attended by members and non-members alike. We will continue to introduce new fundraising ideas and are working to build on last year's successes with our grant applications. Each application we make provides us with the knowledge and experience to improve our submissions, thereby adding value to our grant applications.

We will still face the challenges that many small charities are facing, but with the continued support of our members and our committed management team and volunteers, we aim to improve and stabilise our financial situation and increase our dedicated and specialist volunteers. We can then work towards a future funding more research into a better diagnosis and treatment of Pernicious Anaemia.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2025

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing Document

The Pernicious Anaemia Society is a registered charity and company limited by guarantee, governed by its Memorandum and Articles of Association. In accordance with the constitution of the company every member undertakes to contribute £1 to the company's assets should it be wound up.

Recruitment and Appointment of the Management Committee.

The directors of the company are also charity trustees for the purpose of charity law. All trustees give their time voluntarily and receive no benefits from the charity for their roles. The trustees appoint the members of the Management Committee, based on the skills and experience they feel will be of benefit to the charity.

Appointment of Directors/Trustees

As set out in the company's Articles of Association, the directors/(trustees) may, by ordinary resolution, appoint a person willing to serve in that capacity.

Induction and Training

New directors undergo a period of orientation to brief them on: their legal obligations under charity and company law, the Charity Commission guidance on public benefit and inform them of the content of the Memorandum and Articles of Association, the Committee and decision-making process, the current business plan and the recent financial performance of the organisation. They are encouraged to attend appropriate training events where these will facilitate the undertaking of their role.

Organisation

The board of trustees, which has a minimum of 5 members but no maximum, administers the organisation.

The day to day operations are delegated to the management committee members as and when necessary.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2025

RISK MANAGEMENT

The Management Committee has conducted a review of the major risks to which the charity is exposed. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces.

FINANCIAL REVIEW

The financial statements reflect the charity's activities for the year ended 31 March 2025.

At the year end the movement on unrestricted funds amounted to a net surplus of £12,925 compared to a deficit for 2024 of £20,529.

The net movement on restricted funds amounted to a surplus of £107 compared to a surplus of £116 for 2024.

INVESTMENT POLICY

The trustees, having regard to the liquidity requirements of operating the society, have kept any surplus day to day funds in an interest bearing bank deposit account.

RESERVES POLICY

The Management Committee has examined the charity's requirements for reserves in light of the main risks to the organisation. It has established a policy whereby the unrestricted funds not committed or invested in tangible fixed assets held should be between 3 and 6 months of average unrestricted expenditure.

The unrestricted free reserves at 31 March 2025 amounted to £4,972 compared to a deficit of £7,146 at 31st March 2024.

GOING CONCERN

The trustees continue to seek further income streams and keep the operational costs under review to ensure they fulfil the ongoing grant commitments. They consider this meets the going concern basis on which these accounts have been prepared. There is an expectation that there will be adequate funding to continue operating for the foreseeable future.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2025

EMPLOYEE MATTERS

The charity had one employee in 2024/25 (2023/2024: Nil) and has a policy in place relating to employee matters. The trustees are responsible for the appointment of employees and other related staff matters.

A payroll scheme commenced operation from 1 April 2024. Pension contributions are to be made through a NEST scheme.

The activities of the charity are mainly carried out by unpaid volunteers.

By order of the board of trustees

13 September 2025

Elizabeth Smart
Chair

THE PERNICIOUS ANAEMIA SOCIETY

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE PERNICIOUS ANAEMIA SOCIETY

Year ended 31 March 2025

I report to the charity trustees on my examination of the accounts of The Pernicious Anaemia Society for the year ended 31st March 2025.

Responsibilities and basis of report

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

Independent examiners' statement

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

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

the accounts do not accord with those records; or

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

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 & Republic of Ireland (FRS102)

I have no other 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.

H Rumsey FCA, Dch A
Ensors, Chartered Accountants
Connexions, 159 Princes Street
Ipswich, IP1 1QJ

29 September 2025

THE PERNICIOUS ANAEMIA SOCIETY

Statement of Financial Activities

Year ended 31 March 2025

	NOTE	Unrestd Funds £	Restrd Funds £	2025 TOTAL £	2024 TOTAL £
Income and Endowments from:					
Grants and donations		19,656	-	19,656	12,383
Gift Aid		4,465	-	4,465	3,498
Charitable Activities	2	33,254	-	33,254	26,224
Investments		201	107	308	547
Total		<u>57,575</u>	<u>107</u>	<u>57,682</u>	<u>42,652</u>
Expenditure on:					
Charitable activities	3	44,650	-	44,650	63,065
Total		<u>44,650</u>	<u>-</u>	<u>44,650</u>	<u>63,065</u>
Net surplus/(deficit)		12,925	107	13,033	(20,413)
Reconciliation of Funds					
Total funds brought forward		(5,336)	7,616	2,280	22,693
Total funds carried forward		<u>7,589</u>	<u>7,723</u>	<u>15,312</u>	<u>2,280</u>

The statement of financial activities includes all gains and losses for the year
All incoming resources and resources expended derive from continuing activities

The notes on pages 17 to 23 form part of these financial statements

THE PERNICIOUS ANAEMIA SOCIETY

Balance Sheet as at 31st March 2025

			2025		2024
	NOTE	£	£	£	£
Fixed Assets					
Tangible assets	6		2,617		1,810
Current Assets					
Debtors	7	4,872		2,344	
Cash at Bank		30,532		30,328	
		<u>35,404</u>		<u>32,672</u>	
Creditors: amounts falling due within one year	8	<u>(14,629)</u>		<u>(17,358)</u>	
Net Current Assets			20,775		15,314
Creditors -falling due in more than one year			(8,080)		(14,844)
Net Assets			<u>15,312</u>		<u>2,280</u>
Unrestricted funds			7,589		(5,336)
Restricted fund			7,723		7,616
Total Funds			<u>15,312</u>		<u>2,280</u>

For the financial year ended 31 March 2025 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 charitable company to obtain an audit of the accounts for the year in question in accordance with section 476.

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

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

These financial statements were approved by the trustees and are signed on their behalf by:

.....
Elizabeth Smart
Chair

.....
Stephen Ganter

Date: 13 September 2025

The notes on pages 17 to 23 form part of these financial statements

Notes to the accounts

Year ended 31 March 2025

1 Accounting Policies

Basis of accounting

The accounts have been prepared in accordance with the Charities governing document, the Companies Act 2006, FRS 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities SORP '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 the Republic of Ireland (FRS102).

The charity is a public benefit entity as defined by FRS102.

The accounts are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these accounts are rounded to the nearest £.

Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy notes.

The charity has taken advantage of the provisions of the SORP not to prepare a statement of cash flows.

The trustees continue to seek further income streams and keep the operational costs under review to ensure they fulfil the ongoing grant commitments. They consider this meets the going concern basis on which these accounts have been prepared. There is an expectation that there will be adequate funding to continue operating for the foreseeable future.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

The restricted fund represents a fund started for research into the relationship between Stomach Cancer and Pernicious Anaemia. It will continue to grow until it reaches £10,000 when it will be handed over to Professor Mark Pritchard.

Fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is provided to write off the cost of fixed assets over their useful lives at the rate of 25% on a reducing balance basis.

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2025

Impairment of assets

At each reporting date the charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered any impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of impairment loss, (if any).

Income

Income is recognised when there is entitlement to the funds, any performance conditions attached to the item have been met, it is probable that the income will be received and the amount can be measured reliably and it is not deferred.

Grants and donations are included when received.

Gift Aid is included on an accruals basis

Income from charitable activities is shown gross with associated costs included as charitable expenditure. The income is accounted for when received.

Expenditure

Expenditure is recognised once there is a legal or constructive obligation to make payment to a third party, it is probable that settlement will be required, and the amount of the obligation can be measured reliably.

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities.

Governance costs include those costs associated with meeting the constitutional and statutory requirements of the charity and include the fees for the independent examination.

Cash at bank and in hand

Cash at bank and in hand represents highly liquid funds held in bank accounts.

Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments.

Basic financial instruments are recognised in the Balance Sheet when the charity becomes party to the contractual provision of the instrument.

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2025

Employee holiday pay and benefits

No provision is made for unused holiday pay at the period end.

Any employment benefits are recognised when incurred.

Pension contributions

Contributions are charged to the Statement of Financial Activities when they become payable.

Accounting estimates and areas of judgement

Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. There are no critical accounting estimates.

2	Income	2025 £	2024 £
	Charitable activities:		
	Membership Fees	30,636	26,174
	Book Sales	212	50
	Seminars	2,406	-
		<u>33,254</u>	<u>26,224</u>
3	Expenditure	2025 £	2024 £
	Charitable Activities:		
	Trustees' expenses	-	622
	Insurances	3,083	1,989
	Administration	474	1,652
	Communications	1,454	1,595
	Office costs	1,843	791
	Research Costs (note 12)	1,460	22,543
	Website design and maintenance	19,613	14,788
	Symposium, conference costs	198	273
	Volunteer costs	283	221
	Promotion and fundraising	-	440
	Finance Charges	1,371	970
	Payroll (note 10)	6,240	-
	Purchase of books	1,214	1,769
	Sundry costs	795	1,206
	Professional fees	470	6,093
	Depreciation	872	603
	Loss on disposals	-	1,480
	Governance - Independent examination	5,280	4,800
	Governance -Other matters	-	1,230
		<u>44,650</u>	<u>63,065</u>

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2025

4 Trustee remuneration and related party transactions

No remuneration was paid to trustees during the year (2024: NIL)

Donations from trustees amounted to £120 (2024: £120)

No travel and conference costs were reimbursed to a trustee (2024: £843).

In 2024 Excellence in Report Writing/Expert Witness training was provided for 3 volunteers at £1,206 and was included in Sundry costs.

5 Taxation

As a charity, The Pernicious Anaemia Society is exempt from tax on income and gains received within the categories covered under Part 11 of the Corporation Taxes Act 2010 or section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

6 Tangible fixed assets

	Equipment £
Cost	
At 1 April 2024	5,725
Additions	1,680
Disposal of assets	-
At 31 March 2025	<u>7,404</u>
Accumulated depreciation	
At 1 April 2024	3,915
Charge for the year	872
On disposals	-
At 31 March 2025	<u>4,787</u>
Net book value	
At 31 March 2025	<u>2,617</u>
At 31 March 2024	<u>1,810</u>

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2025

	2025	2024
	£	£
7 Debtors		
Gift Aid repayment	402	321
Prepayments	4,470	2,023
	<u>4,872</u>	<u>2,344</u>

All debtors relate to unrestricted funds.

	2025	2024
	£	£
8 Creditors: amounts falling due within one year.		
Creditors and accruals	<u>14,629</u>	<u>17,358</u>
These include an accrual of £5,644 for funding to University of Surrey and £2,488 for funding to Norwich University (see note 11)		
	£	£
More than 1 year	<u>8,080</u>	<u>14,844</u>
Representing the balance of funding to University of Norwich (see note 11)		

All creditors relate to unrestricted funds.

9 Allocation of funds			
Year ended 31 March 2025	UnRestd	Restd	TOTAL
	£	£	£
Fixed assets	2,617	-	2,617
Current assets	27,681	7,723	35,404
Current liabilities	(14,629)	-	(14,629)
Liabilities - due in more than one year	(8,080)	-	(8,080)
	<u>7,589</u>	<u>7,723</u>	<u>15,312</u>
Year ended 31 March 2024	UnRestd	Restd	TOTAL
	£	£	£
Fixed assets	1,810	-	1,810
Current assets	25,056	7,616	32,672
Current liabilities	(17,358)	-	(17,358)
Liabilities - due in more than one year	(14,844)	-	(14,844)
	<u>(5,336)</u>	<u>7,616</u>	<u>2,280</u>

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2025

10 Employee remuneration

There was one employee during the year ended 31 March 2025 on a gross salary of £5,240 (2024: Nil). No Employers National Insurance contributions were due.

No remuneration has been paid to any trustees in either year.

No adjustment for unpaid holiday pay was required at the year end as deemed immaterial.

The charity relies on volunteer support to carry out its activities.

11 Funding commitments

The charity has committed to support a Phd student stipend for research at the University of Surrey for a period of 4 years. The agreement was entered into in October 2022 and will complete in March 2026.

The balance outstanding at 31 March 2025 amounted to £5,644.

In June 2023 the charity formally agreed to fund a research student at Norwich University at a cost of £15,620 over a six year period.

A balance of £10,568 remains outstanding at 31 March 2025.

12 Grants payable

(Included in Research costs)

	2025	2024
	£	£
University of Surrey	-	8,359
Norwich University	1,460	13,800
	<u>1,460</u>	<u>22,159</u>
 Total creditor brought forward	(28,602)	(30,711)
Payments in year	13,850	24,268
Total creditor carried forward	<u>16,212</u>	<u>28,602</u>
Charged to Statement of Financial Activities	<u>1,460</u>	<u>22,159</u>

13 Members Guarantee

The charitable company is limited by guarantee, governed by its Memorandum and Articles of Association. In accordance with the constitution of the company every member undertakes to contribute such amount (not exceeding £1) to the company's assets should it be wound up.

THE PERNICIOUS ANAEMIA SOCIETY

Statement of Financial Activities Year ended 31 March 2024

	NOTE	Unrestd Funds £	Restr'd Funds £	2024 TOTAL £
Income and Endowments from:				
Grants and donations		12,368	15	12,383
Gift Aid		3,498	-	3,498
Charitable Activities	2	26,224	-	26,224
Investments		446	101	547
Total		42,536	116	42,652
Expenditure on:				
Charitable activities	3	63,065	-	63,065
Total		63,065	-	63,065
Net (deficit)/surplus		(20,529)	116	(20,413)
Reconciliation of Funds				
Total funds brought forward		15,193	7,500	22,693
Total funds carried forward		(5,336)	7,616	2,280

The statement of financial activities includes all gains and losses for the year
All incoming resources and resources expended derive from continuing activities

THE PERNICIOUS ANAEMIA SOCIETY

England & Wales - Charity number 1147839

Accounts

Company number **7904047 (England and Wales)**

Charity number **1147839**

THE PERNICIOUS ANAEMIA SOCIETY

Financial Statements
For the year ended 31st March 2024

THE PERNICIOUS ANAEMIA SOCIETY

Financial Statements For the year ended 31st March 2024

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THE PERNICIOUS ANAEMIA SOCIETY

REFERENCE AND ADMINISTRATIVE INFORMATION

Charity Name	The Pernicious Anaemia Society
Charity registration number	1147839
Company registration number	7904047
Registered Office and operational address	Brackla House Brackla Street Bridgend Glamorgan CF31 1BZ

Trustees

Katrina Burchell	(Resigned 7 December 2023)
Elizabeth Smart	(Chair from 16 September 2023)
David Connell-Smith	(Treasurer to 16 September 2023)
Theresa Berta Taylor	
Dr Lenira Ferreira Semedo	(Resigned 16 September 2023)
Dr Anna Guildford	(Resigned 16 September 2023)
Stephen Ganter	
Dr John Pelham Warren	
Tara Tierney	(Appointed 16 September 2023)
Andrew Emerson	(Appointed 16 September 2023)
Alex David	(Appointed 16 September 2023)

Management Committee

Katrina Burchell	(CEO from 16 September 2023)
David Connell-Smith	(To 16 September 2023)
Karyl Carter	
Petra Visser	
Nicola Finck	(Treasurer from 16 September 2023)

Company Secretary

David Connell-Smith	(To 16 September 2023)
Nicola Finck	(From 16 September 2023)

Independent Examiner

Mrs H Rumsey
Ensors Accountants LLP
Connexions, 159 Princes Street
Ipswich
IP1 1QJ

Bankers

National Westminster Bank Plc
28 Adare Street Bridgend
CF31 1EN

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2024

The trustees present their report and the unaudited financial statements of the charity for the year ended 31 March 2024. The details on page one form part of this report.

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity's governing document, the Charities Act 2011 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 the Republic of Ireland (FRS102)'. They are also prepared in accordance with the Companies Act 2008.

OBJECT OF THE CHARITY

To promote and protect the physical and mental health of sufferers of pernicious anaemia.
Advance the education of the general public in all areas relating to pernicious anaemia.
Promote and participate in research into the causes and treatment of pernicious anaemia.

PUBLIC BENEFIT

The trustees are aware of the Charity Commission's guidance in relation to delivering public benefit and believe the charity is fulfilling its requirements.

REVIEW OF THE YEAR - Chair's report

see pages 3 to 8

THE PERNICIOUS ANAEMIA SOCIETY
Year ended 31 March 2024

Chair of Trustees Annual Report

Charity name – Pernicious Anaemia Society

Registered charity number - 1147839

Charity's principal address - The Pernicious Anaemia Society

Brackla House, Brackla Street

Bridgend, CF31 1BZ

Trustees – Alex Aitcheson-David, David Connell-Smith, Andrew Emerson, Stephen Ganter,
Liz Smart (Chair), Theresa Taylor, Tara Tierney, Dr. John Warren

Summary of the purposes of the charity

To offer and provide information about Pernicious Anaemia, its causes, effects, and treatment.

To offer and provide help and support to sufferers of Pernicious Anaemia and their families.

Our main activities are to promote and participate in research into the causes and treatment of Pernicious Anaemia to improve the diagnosis and treatment of the condition.

We are focused on our service users. Our ethos reflects this, and we concentrate on the dignity of individuals who have the right to participate in the design and monitoring of their treatment.

Trustees are identified by the executive and are invited to produce a CV. Final selection is made by the Board of Trustees. On appointment, all the Trustees are issued guidance by the Charity Commission on public benefit.

The contribution made by volunteers is substantial. All the work of the Society is carried out by volunteers. The small group who forms the Executive carry out the majority of the work of the Society which is substantial including responding to email enquiries from members. The helpline and support group volunteers along with the Trustees are all committed to the aims of the Society. Further, the Trustees aim to help with the Society's new business plan e.g. fundraising, supporting the finance manager, writing blogs etc.

The Society, despite its size has achieved much in the previous year. New alliances have been forged which will support the aims of the Society. New support groups have been established, one in the USA. The long-awaited NICE Guideline on B12 deficiency was finally published and identified the lack of research on the topic. The Guideline omitted to use the term Pernicious Anaemia in its title, however our Society continues to support research and the Priority Setting Partnership in conjunction with the James Lind Alliance has identified the Top Ten uncertainties of Pernicious Anaemia. The Society, despite its limited budget, is funding two PHD students which will add to the knowledge base on Pernicious Anaemia.

The Charity's financial position at the end of the period. As with most charities this year has been difficult; membership levels had been dropping as more and more online information became available. Grants and funding became more difficult to come by and were often focused on specific areas of health or social issues which excluded the specialist nature of our condition. This combined with the legacy expenditure committed by the founder of PAS before he left the organisation, which paid for the JLA research but which was also allocated to pay for two PhD students to carry out research over the next 4-5 years has resulted in a need to concentrate our focus on fundraising in order to meet our objectives.

THE PERNICIOUS ANAEMIA SOCIETY

Year ended 31 March 2024

CHAIR'S REPORT (continued)

CHIEF EXECUTIVE OFFICER'S REPORT

This last year has been a very busy and exciting one for the charity. We embarked on drafting our 3-year business plan with help from the trustees and on an in-depth review of our goals and missions, our fundraising and communication plans thanks to the very generous help of ZS Consultancy who have freely and willingly given up their time to help us. The outcome of this work and the long list of "to do" items it generated has enthused the management committee and will significantly benefit members and people with pernicious anaemia worldwide. There is still work to do on finalising the documentation but during this past year we have started building on some of the foundations these discussions have recommended. This last financial year was the first under our new structure with a more formalised board of Trustees, a Chief Executive Officer and a Management Committee with well-defined roles and meeting schedules.

JAMES LIND ALLIANCE PRIORITY SETTING PARTNERSHIP ON PERNICIOUS ANAEMIA and RESEARCH

The Top Ten uncertainties identified by the Priority Setting Partnership with the James Lind Alliance remains a core priority for the Society and together with the University of Surrey and the PhD student we are supporting, we have made strides into some of the key questions. We continue to work with numerous other research bodies looking for other opportunities to further research in this area. I was involved in the GW4 Fatigue Study workshops and further work needs to be done to identify sources who can drive research projects on the questions which are so important to our members. We are starting work with the PhD student we are partially funding in Norwich which will be looking at a very interesting area of B12 Deficiency.

NATIONAL INSTITUTE FOR HEALTH AND CARE EXCELLENCE GUIDELINE ON VITAMIN B₁₂ DEFICIENCY

NICE encountered challenges in getting sufficient expertise and relevant research to work on the drafting of the guidelines and regrettably, in our view, they dropped the reference to Pernicious Anaemia in the title and the remit excluded B12 deficiency in under 16s. The publication of the Draft in August 2023 gave the Society as stakeholders the opportunity to give feedback and we sent in more than 44 pages of comments backed up by patient experience and links to research. The guidelines were published on 6th March 2024 and the Society issued a statement and press release. The statement can be found on our website. Through our membership of the B12-Alliance and with myself as chair of that organisation we were also able to benefit from the social media campaign that organisation ran alongside ours. There is much to do regarding further research and education of the health care profession which is part of our future focus.

CLUB-12

Our involvement with Club-12 continues and I regularly attend the twice monthly meetings of the wider organisation and the research meetings of the PA sub-group. During 2023 the B12-Alliance was formed which is a group representing the not-for-profit patient advocacy sector and I was appointed the first chair. Working together with other organisations gives us the opportunity to speak with a louder voice in some instances but still enables us to speak to our own specific issues under the banner of our own organisation. As chair of the B12-Alliance I helped set up the working group which has now commenced work on the Education programme for the Health Care Professionals on B12 Deficiency including Pernicious Anaemia, this is going to be vitally important for doctors, healthcare workers and patients alike.

THE PERNICIOUS ANAEMIA SOCIETY
Year ended 31 March 2024
CHAIR'S REPORT (continued)

AGM 2022

The Annual General Meeting of the Society took place virtually on Saturday, 16th September 2023.

PA DAY and SEMINAR

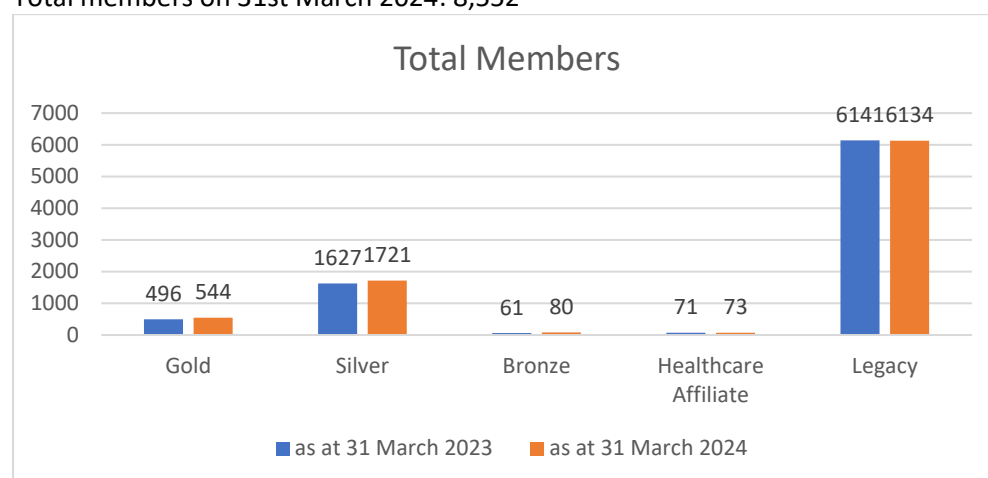
We introduced in a low-key way, the concept of a day specifically recognising Pernicious Anaemia and settled on 12th October 2023. We plan to make this bigger over the coming years hopefully generating fundraising and raising awareness activities. We held a Seminar on 14th October 2023 where the speakers were Kourosh Ahmadi, Alfie Thain and Nicola Ward.

MANAGEMENT COMMITTEE

During the last financial year, the management committee has been focussed on a number of vital tasks required to update our systems particularly in the area of accounting and reporting. This has been a huge amount of work, especially for our Treasurer, not least with challenges we faced from NatWest Bank whose policy and approach to charity accounts required us to go to the Ombudsman to get our bank account updated with signatories and trustee names. A huge amount of effort was made by both our former and the existing treasurer and eventually NatWest complied with what they were legally required to do. Escalating costs of insurance and many services which the charity has to fund from our membership subscriptions has been a challenge during this financial year but, recognising the challenges for PA patients in their own journey which sometimes means they cannot work, we have kept the subscription rates the same. Our social media policy introduced in the previous year is beginning to show dividends. A large amount of work has been done by our office manager on training of support group co-ordinators, help desk volunteers and three of our volunteers took part in Expert Witness training. Our newsletter content continues to go from strength to strength and I introduced a series of blogs written by experts in the field which have been warmly received with excellent feedback from our members and are frequently shared on the social media pages of other organisations all helping to raise awareness of the charity and Pernicious Anaemia. We have issued two updated help sheet guidelines and continued to update the material on our website.

Membership

Total members on 31st March 2024: 8,552

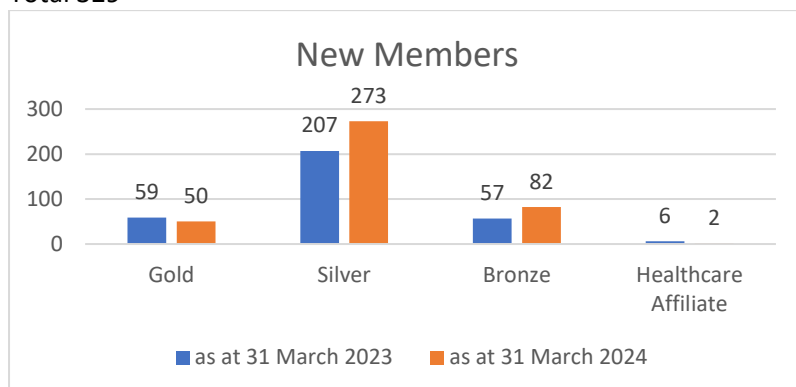


²Legacy members are those who joined with a lifetime fee of £20. They do not incur any annual membership renewal fee.

THE PERNICIOUS ANAEMIA SOCIETY
Year ended 31 March 2024
CHAIR'S REPORT (continued)

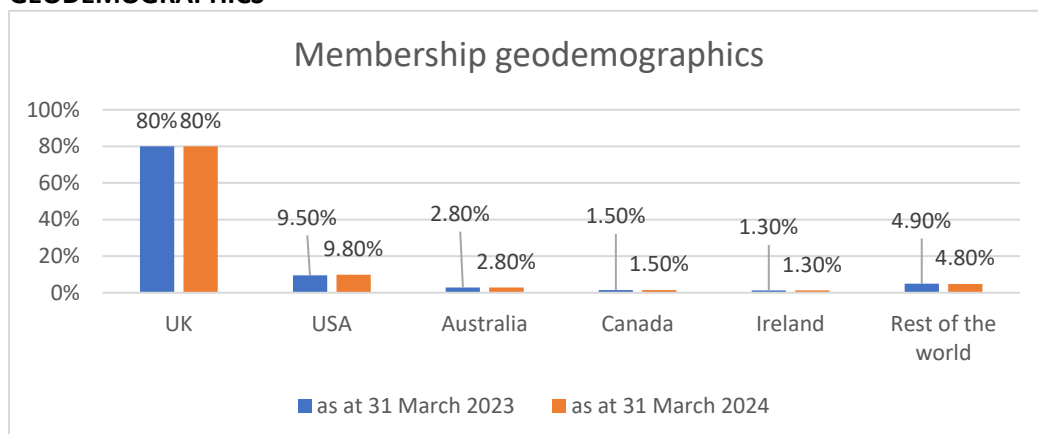
New members 01.04.22 - 31.03.23

Total 329

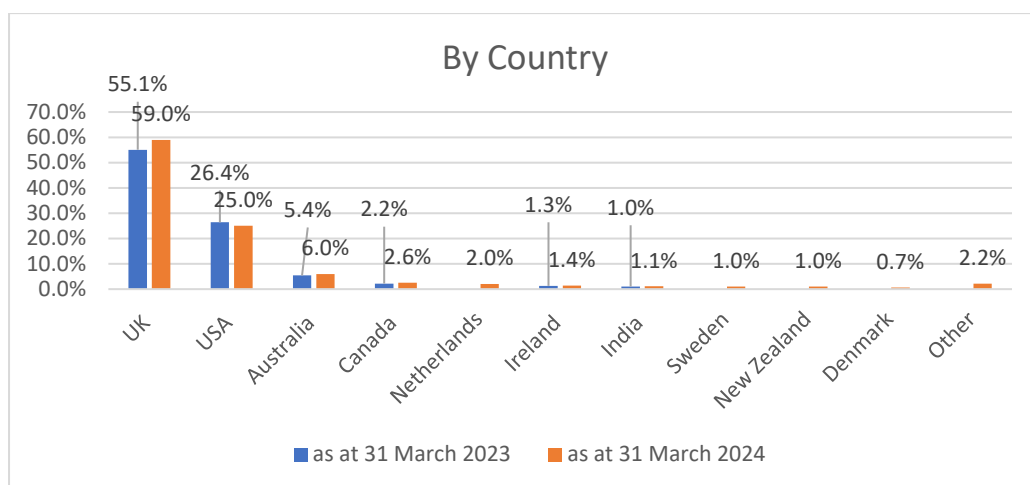


HCA = Healthcare Professional Affiliates. HCA's are offered free membership if they are currently treating or working with patients with Pernicious Anaemia.
 432 cancellations and expirations.

GEODEMOGRAPHICS



Geo website visits



THE PERNICIOUS ANAEMIA SOCIETY
Year ended 31 March 2024
CHAIR'S REPORT (continued)

Website analytics

User Analytics		
	as at 31 March 2023	as at 31 March 2024
Page Views	299,524	No data available
Users	102,805	98000
New Users	92%	No data available
Sessions	137509	No data available
Average Session Duration	00:02:36	00:02:53
Pages/Session	2.18	2.26

How did they find us?

	as at 31 March 2023	as at 31 March 2024
Organic Search	75%	57.80%
Direct	18%	22.30%
Social Media	3%	15%
Referral from other sites	4%	4.9%

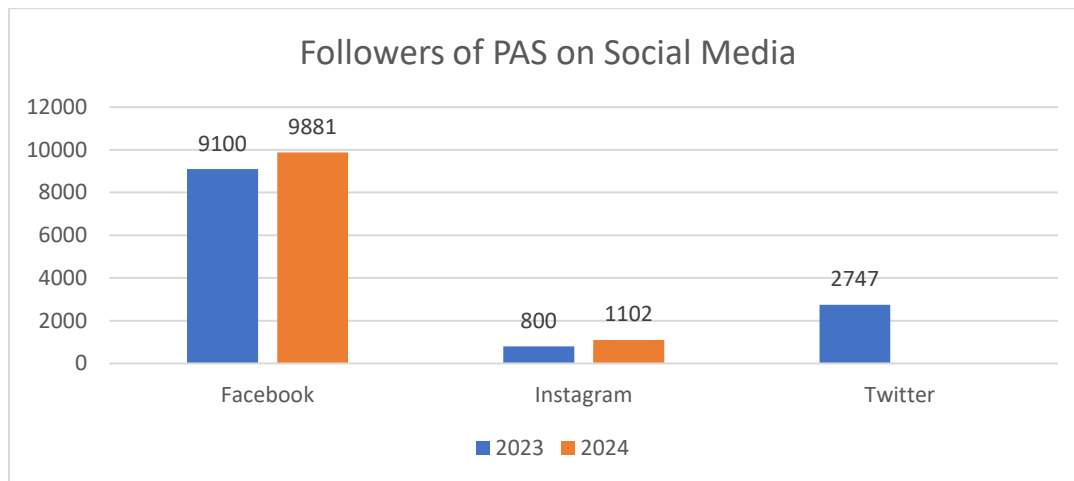
2024 Most visited website pages:

- 1 Homepage
- 2 Symptoms
- 3 Testing for Pernicious Anaemia
- 4 What is Pernicious Anaemia?
- 5 Only one chance (blog post)
- 6 B12 deficiency and pernicious anaemia
- 7 Diagnosis
- 8 Treatment
- 9 Member login
- 10 Personal stories

Social Media

Overall Top Performing Content 2024

- 1 Symptoms of Pernicious Anaemia
- 2 PA Misconceptions
- 3 Unravelling the mystery: How B12 works in the body
- 4 NICE guideline: Vitamin B12 deficiency in over 16s: diagnosis and management
- 5 NICE National Institute for Health and Care Excellence



The Future

The new year has started to see some improvements, our social media strategy is beginning to pay dividends as membership numbers have gradually started to increase and some of our existing members have converted their legacy membership to either the Annual or Lifetime memberships. Our online seminar on 24th April 2024, for which there was a small charge, was well attended and helped to cover the cost of running it. We are continuing to introduce new fundraising ideas including applying for grants and funding, which we believe, that armed with our new clear business plan and detailed strategy report, both of which are of a considerably higher standard than previously, will pay dividends during 2025 and ongoing. We will still face the challenges that many small charities face, but with the continued support of our members and our committed management committee and volunteers, we aim to improve and stabilise our financial situation and work towards a future where we can support more research to provide brighter tomorrows for our membership and all pernicious anaemia sufferers. Alongside our financial growth, we need to grow our dedicated and specialist volunteers to help realise our goals of making a significant impact in the next few years.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2024

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing Document

The Pernicious Anaemia Society is a registered charity and company limited by guarantee, governed by its Memorandum and Articles of Association. In accordance with the constitution of the company every member undertakes to contribute £1 to the company's assets should it be wound up.

Recruitment and Appointment of the Management Committee.

The directors of the company are also charity trustees for the purpose of charity law. All trustees give their time voluntarily and receive no benefits from the charity for their roles. The trustees appoint the members of the Management Committee, based on the skills and experience they feel will be of benefit to the charity.

Appointment of Directors/Trustees

As set out in the company's Articles of Association, the directors/(trustees) may, by ordinary resolution, appoint a person willing to serve in that capacity.

Induction and Training

New directors undergo a period of orientation to brief them on: their legal obligations under charity and company law, the Charity Commission guidance on public benefit and inform them of the content of the Memorandum and Articles of Association, the Committee and decision-making process, the current business plan and the recent financial performance of the organisation. They are encouraged to attend appropriate training events where these will facilitate the undertaking of their role.

Organisation

The board of trustees, which has a minimum of 5 members but no maximum, administers the organisation.

The day to day operations are delegated to the management committee members as and when necessary.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2024

Trustees' responsibilities in relation to the financial statements

The charity trustees (who are also the directors of the Pernicious Anaemia Society for the purposes of company law) are responsible for preparing a trustees' annual report and financial statements in accordance with applicable law for each financial period which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure of that period.

In preparing those financial statements, the trustees are required to select suitable accounting policies, as described on pages 15 to 17, and then apply them consistently, observe the methods and principles in the Charities SORP and make judgements and estimates that are prudent and reasonable. The trustees must also prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud or other irregularities.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charity's website.

RISK MANAGEMENT

The Management Committee has conducted a review of the major risks to which the charity is exposed. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces.

FINANCIAL REVIEW

The financial statements reflect the charity's activities for the year ended 31 March 2024. At the year end the movement on unrestricted funds amounted to a net deficit of £20,529 compared to a deficit for 2023 of £54,177. The net movement on restricted funds amounted to a surplus of £116 compared to a surplus of £4,671 for 2023.

INVESTMENT POLICY

The trustees, having regard to the liquidity requirements of operating the society, have kept any surplus day to day funds in an interest bearing bank deposit account.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2024

RESERVES POLICY

The Management Committee has examined the charity's requirements for reserves in light of the main risks to the organisation. It has established a policy whereby the unrestricted funds not committed or invested in tangible fixed assets held should be between 3 and 6 months of average unrestricted expenditure.

The unrestricted general reserves at 31 March 2023 excluding fixed assets, amounted to a deficit of £7,146 compared to £11,300 at 31st March 2023.

GOING CONCERN

The financial results indicate that the charity may not be a going concern but since the year end there has been an improvement in the finances of the charity and further funds are anticipated. The trustees are reliant on the success of their plans to enable them to fulfil the ongoing grant commitments and meet the anticipated operational cost of the charity. They have a reasonable expectation that there will be adequate resources to continue operating for the foreseeable future.

EMPLOYEE MATTERS

The charity had no employees in 2023/24 but it does have a policy in place relating to employee matters. The trustees are responsible for the appointment of employees and other related staff matters.

A payroll scheme will operate from 1 April 2024 and pension contributions are to be made through a NEST scheme.

The activities of the charity are mainly carried out by unpaid volunteers.

By order of the board of trustees

.....
Elizabeth Smart
Chair

26 October 2024

THE PERNICIOUS ANAEMIA SOCIETY

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE PERNICIOUS ANAEMIA SOCIETY

Year ended 31 March 2024

I report to the charity trustees on my examination of the accounts of The Pernicious Anaemia Society for the year ended 31st March 2024.

Responsibilities and basis of report

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

Independent examiners' statement

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

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

the accounts do not accord with those records; or

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

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 & Republic of Ireland (FRS102)

I draw attention to the going concern basis on which, the accounts have been prepared. This is reliant on the success of the trustees' plans as referred to in Note 1.

I have no other 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.

Helen Rumsey FCA

Ensors Accountants LLP

Connexions, 159 Princes Street

Ipswich, IP1 1QJ

13 November 2024

THE PERNICIOUS ANAEMIA SOCIETY

Statement of Financial Activities Year ended 31 March 2024

	NOTE	Unrestd Funds £	Restd Funds £	2024 TOTAL £	2023 TOTAL £
Income and Endowment from:					
Grants and donations		12,368	15	12,383	14,434
Gift Aid		3,498	-	3,498	4,635
Charitable Activities	2	26,224	-	26,224	25,385
Investments		446	101	547	222
Total		42,536	116	42,652	44,676
Expenditure on:					
Charitable activities	3	63,065	-	63,065	94,182
Total		63,065	-	63,065	94,182
Net (deficit)/surplus		(20,529)	116	(20,413)	(49,506)
Reconciliation of Funds					
Total funds brought forward		15,193	7,500	22,693	72,199
Total funds carried forward		(5,336)	7,616	2,280	22,693

The statement of financial activities includes all gains and losses for the year
All incoming resources and resources expended derive from continuing activities

The notes on pages 15 to 21 form part of these financial statements

THE PERNICIOUS ANAEMIA SOCIETY

Balance Sheet as at 31st March 2024

			2024		2023
	NOTE	£	£	£	£
Fixed Assets					
Tangible assets	6		1,810		3,893
Current Assets					
Debtors	7	2,344		2,533	
Cash at Bank		30,328		50,578	
			<u>32,672</u>	<u>53,111</u>	
Creditors: amounts falling due within one year	8	<u>(17,358)</u>		<u>(12,100)</u>	
Net Current Assets			15,314		41,011
Creditors -falling due in more than one year			(14,844)		(22,211)
Net Assets			<u>2,280</u>		<u>22,693</u>
Unrestricted funds			(5,336)		15,193
Restricted fund			7,616		7,500
Total Funds			<u>2,280</u>		<u>22,693</u>

For the financial year ended 31 March 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 charitable company to obtain an audit of the accounts for the year in question in accordance with section 476.

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

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

These financial statements were approved by the trustees and are signed on their behalf by:

.....
Elizabeth Smart
Chair

.....
Stephen Ganter

Date: ...26 October 2024.....

The notes on pages 15 to 21 form part of these financial statements

Notes to the accounts

Year ended 31 March 2024

1 Accounting Policies

Basis of accounting

The accounts have been prepared in accordance with 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 the Republic of Ireland (FRS102).

The charity is a public benefit entity as defined by FRS102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy notes.

The accounts are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these accounts are rounded to the nearest £.

The accounts have been prepared on the going concern basis. However, this is reliant on the success of the trustee's plans to fulfil their ongoing grant commitments and anticipated operational costs. They have a reasonable expectation that there will be adequate funding to continue operating for the foreseeable future.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

The restricted fund represents a fund started for research into the relationship between Stomach Cancer and Pernicious Anaemia. It will continue to grow until it reaches £10,000 when it will be handed over to Professor Mark Pritchard.

Fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses. Depreciation is provided to write off the cost of fixed assets over their useful lives at the rate of 25% on a reducing balance basis.

Impairment of assets

At each reporting date the charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered any impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of impairment loss, (if any).

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2024

Income

Income is recognised when there is entitlement to the funds, any performance conditions attached to the item have been met, it is probable that the income will be received and the amount can be measured reliably and it is not deferred.

Grants and donations are included when received.

Gift Aid is included on an accruals basis

Income from charitable activities is shown gross with associated costs included as charitable expenditure. The income is accounted for when received.

Expenditure

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required, and the amount of the obligation can be measured reliably.

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities.

Governance costs include those costs associated with meeting the constitutional and statutory requirements of the charity and include the fees for the independent examination.

Other expenditure represents those items not falling into any other heading.

Cash at bank and in hand

Cash at bank and in hand represents highly liquid funds held in bank accounts.

Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments.

Basic financial instruments are recognised in the Balance Sheet when the charity becomes party to the contractual provision of the instrument.

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2024

Accounting estimates and areas of judgement

Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. There are no critical accounting estimates.

2	Income	2024	2023
		£	£
	Charitable activities:		
	Membership Fees	26,174	25,385
	Book Sales	50	-
		<u>26,224</u>	<u>25,385</u>
3	Expenditure	2024	2023
		£	£
	Charitable Activities:		
	Trustees' expenses	622	417
	Insurances	1,989	1,628
	Administration	1,652	407
	Communications	1,595	2,063
	Office costs	791	718
	Research Costs (note 12)	22,543	31,244
	Website design and maintenance	14,788	12,309
	Car lease	-	1,244
	Symposium, conference costs	273	5,000
	Volunteer costs	221	478
	Promotion and fundraising	440	678
	Finance Charges	970	782
	Purchase of books	1,769	550
	Sundry costs	1,206	73
	Support Group costs	-	53
	Professional fees	6,093	31,006
	Depreciation	603	1,297
	Loss on disposals	1,480	-
	Governance - Independent examination	4,800	4,235
	Governance -Other matters	1,230	-
		<u>63,065</u>	<u>94,182</u>

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2024

4 Trustee remuneration and related party transactions

No remuneration was paid to trustees during the year (2023: NIL)

Donations from trustees amounted to £120 (2023: £60)

Travel and conference costs of £843 were reimbursed to a trustee (2023: £417 to 2 trustees)

During the year ended 31 March 2023 Mrs K Burchell was reimbursed for a payment for legal fees of £600. She then donated £600 on which Gift aid of £150 was claimed. (2024: NIL)

During the year ended 31 March 2023 Mr MV Hooper MBE, a director/trustee (until 9 May 2023) received £1,500 for consultancy fees. (2024: NIL)

Excellence in Report Writing/Expert Witness training provided for 3 volunteers at £1,206 is included in Sundry costs.

5 Taxation

As a charity, The Pernicious Anaemia Society is exempt from tax on income and gains received within the categories covered under Part 11 of the Corporation Taxes Act 2010 or section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

6 Tangible fixed assets

	Equipment £
Cost	
At 1 April 2023	13,614
Disposal of assets	(7,889)
At 31 March 2024	<u>5,725</u>
Accumulated depreciation	
At 1 April 2023	9,721
Charge for the year	603
On disposals	(6,409)
At 31 March 2024	<u>3,915</u>
Net book value	
At 31 March 2024	<u>1,810</u>
At 31 March 2023	<u>3,893</u>

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2024

	2024	2023
	£	£
7 Debtors		
Gift Aid repayment	321	412
Prepayments	2,023	2,121
	<u>2,344</u>	<u>2,533</u>

All debtors relate to unrestricted funds.

	2024	2023
	£	£
8 Creditors: amounts falling due within one year.		
Creditors and accruals	<u>17,358</u>	<u>12,100</u>
These include an accrual of £11,458 for funding to University of Surrey and £2,300 for funding to Norwich University (see note 11)		
	£	£
More than 1 year	<u>14,844</u>	<u>22,211</u>
Representing the balance of funding to University of Surrey and to Norwich University (see note 11)		

All creditors relate to unrestricted funds.

9 Allocation of funds	UnRestd	Restd	TOTAL
	£	£	£
Fixed assets	1,810	-	1,810
Current assets	25,056	7,616	32,672
Current liabilities	(17,358)	-	(17,358)
Liabilities - due in more than one year	(14,844)	-	(14,844)
	<u>(5,336)</u>	<u>7,616</u>	<u>2,280</u>

Year ended 31 March 2023	UnRestd	Restd	TOTAL
	£	£	£
Fixed assets	3,893	-	3,893
Current assets	45,611	7,500	53,111
Current liabilities	(12,100)	-	(12,100)
Liabilities - due in more than one year	(22,211)	-	(22,211)
	<u>15,193</u>	<u>7,500</u>	<u>22,693</u>

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2024

10 Employee remuneration

There were no employees during the year ended 31 March 2024 (2023: Nil)

The charity relies on volunteer support to carry out its activities.

11 Funding commitments

The charity has committed to support a Phd student stipend for research at the University of Surrey for a period of 4 years. The agreement was entered into in October 2022 and will complete in March 2025.

The balance outstanding at 31 March 2024 amounted to £17,102

In June 2023 the charity formally agreed to fund a research student at Norwich University at a cost of £2,300 per annum over a six year period.

A balance of £11,500 remains outstanding at 31 March 2024

12 Grants payable

(Included in Research costs)

	2024	2023
	£	£
University of Surrey	8,359	30,711
Norwich University	13,800	-
	<u>22,159</u>	<u>30,711</u>

13 Members Guarantee

The charitable company is limited by guarantee, governed by its Memorandum and Articles of Association. In accordance with the constitution of the company every member undertakes to contribute such amount (not exceeding £1) to the company's assets should it be wound up.

THE PERNICIOUS ANAEMIA SOCIETY

Statement of Financial Activities Year ended 31 March 2023

	NOTE	Unrestd Funds £	Restd Funds £	2023 TOTAL £
Income and Endowment from:				
Grants and donations		10,576	3,858	14,434
Gift Aid		3,852	783	4,635
Charitable Activities	2	25,385	-	25,385
Investments		192	30	222
Total		40,005	4,671	44,676
Expenditure on:				
Charitable activities	3	94,182	-	94,182
Total		94,182	-	94,182
Net (deficit)/surplus		(54,177)	4,671	(49,506)
Reconciliation of Funds				
Total funds brought forward		69,370	2,829	72,199
Total funds carried forward		15,193	7,500	22,693

The statement of financial activities includes all gains and losses for the year
All incoming resources and resources expended derive from continuing activities

THE PERNICIOUS ANAEMIA SOCIETY

England & Wales - Charity number 1147839

Accounts

Company number **7904047 (England and Wales)**

Charity number **1147839**

THE PERNICIOUS ANAEMIA SOCIETY

Financial Statements
For the year ended 31st March 2023

THE PERNICIOUS ANAEMIA SOCIETY

Financial Statements For the year ended 31st March 2023

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THE PERNICIOUS ANAEMIA SOCIETY

REFERENCE AND ADMINISTRATIVE INFORMATION

Charity Name	The Pernicious Anaemia Society
Charity registration number	1147839
Company registration number	7904047
Registered Office and operational address	Level 4 Brackla House Brackla Street Bridgend Glamorgan CF31 1BZ
Trustees	Martyn Vaughan Hooper MBE (Chair resigned 9 May 2022) Katrina Burchell (Acting Chair from 9 May 2022) Michael John Stevenson (Resigned 1 September 2022) David Connell-Smith (Treasurer) Theresa Berta Taylor Norman Edward Thomas (Resigned 1 September 2022) Dr Lenira Ferreira Semedo Dr Anna Guildford Elise Dyer (Resigned 1 September 2022) Stephen Ganter Elizabeth Smart (Appointed 10 September 2022) Dr John Pelham Warren (Appointed 10 September 2022)
Management Committee	Katrina Burchell David Connell-Smith (Treasurer) Karyl Carter Petra Visser
Company Secretary	David Connell-Smith
Independent Examiner	Mrs H Rumsey Ensors Accountants LLP Connexions, 159 Princes Street Ipswich IP1 1QJ
Bankers	National Westminster Bank Plc 28 Adare Street Bridgend CF31 1EN

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2023

The trustees present their report and the unaudited financial statements of the charity for the year ended 31 March 2023. The details on page one form part of this report.

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the accounts and comply with the charity's governing document, the Charities Act 2011 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 the Republic of Ireland (FRS102)'.

OBJECT OF THE CHARITY

To promote and protect the physical and mental health of sufferers of pernicious anaemia.
Advance the education of the general public in all areas relating to pernicious anaemia.
Promote and participate in research into the causes and treatment of pernicious anaemia.

PUBLIC BENEFIT

The trustees are aware of the Charity Commission's guidance in relation to delivering public benefit and believe the charity is fulfilling its requirements.

REVIEW OF THE YEAR - Chair's report

see pages 3 to 6

THE PERNICIOUS ANAEMIA SOCIETY
Year ended 31 March 2023

CHAIR'S REPORT

This last year has been a year of change and revision for the Society with the founder and former Chairman retiring in March 2023. During 2022 partly due to the absence of the chair due to illness, the management committee stepped up and began a more formal process of meeting, sharing responsibilities and setting goals by way of a workplan, encouraging greater involvement from the trustees and securing ways of working in terms of contacts, secure systems and passwords.

JAMES LIND ALLIANCE PRIORITY SETTING PARTNERSHIP ON PERNICIOUS ANAEMIA

The Top Ten uncertainties identified by the Priority Setting Partnership with the James Lind Alliance remains a core priority for the Society and further work needs to be done to identify sources who can drive through research projects on the questions.

NATIONAL INSTITUTE FOR HEALTH AND CARE EXCELLENCE GUIDELINE ON VITAMIN B₁₂ DEFICIENCY INCLUDING PERNICIOUS ANAEMIA

NICE has unfortunately delayed the publication of the consultation documents and the eventual publication of the new guidelines which are not now expected until July 2023 and February 2024 respectively. We have grave concerns that the eventual guidelines will not significantly help our members get improved diagnosis and treatment.

CLUB-12

We provided financial support by sponsoring the first symposium held by Club-12 in Cambridge in September 2022. Three members of PAS attended this event. Club-12 was formed in January 2020 to facilitate the sharing of knowledge and co-ordinate research into Vitamin B12 between Scientists and Healthcare Professionals. The event was well attended by eminent physicians and researchers and included valuable presentations from respected and knowledgeable presenters and encouraged healthy debate. Members of the management committee continue to attend Club-12 meetings which are held by Zoom and contribute as a Patient Advocacy group by representing the needs and experiences of patients with or potentially with Pernicious Anaemia.

AGM 2022

The Annual General Meeting of the Society took place virtually on Saturday 10 September 2022.

Focussing on one of our core goals to provide support to members we improved the content of our newsletters, carried out training for support group co-ordinators, introduced new support groups including one in the USA which started at the beginning of 2023. We also engaged a social media expert to help improve our reach to members and potential members.

We have worked closely with the University of Surrey PhD student on a pilot study which in the coming year will be a full research study and have put in place an agreement with Norwich University for a further part time PhD research student focussing on Pernicious Anaemia and B12.

SEMINAR

Due to ongoing concerns on meetings in person post Covid we decided to not have a face-to-face conference and instead we held an online seminar on 15th October 2022 for our members with respected speakers including Heidi Seague, Kourosh Ahmadi and Martyn Hooper and chaired by Katrina Burchell. This seminar was well attended and received excellent feedback. The management committee decided to repeat this format annually if possible and re-visit in person conferences in the future.

THE PERNICIOUS ANAEMIA SOCIETY
Year ended 31 March 2023
CHAIR'S REPORT (continued)

Membership

Total members on 31st March 2023: 8,396

Gold 496

Silver 1,627

Bronze 61

Healthcare Affiliate 71

Legacy² 6,141

²Legacy members are those who joined with a lifetime fee of £20. They do not incur any annual membership renewal fee.

New members 01.04.22 - 31.03.23

Total 329

Gold 59

Silver 207

Bronze 57

HCA 6

HCA = Healthcare Professional Affiliates. HCA's are offered free membership if they are currently treating or working with patients with Pernicious Anaemia.

432 cancellations and expirations.

GEODEMOGRAPHICS

80% of members are from the UK

9.5% of members are from the US

2.8% of members are from AUSTRALIA

1.5% of members are from CANADA

1.3% of members are from IE

4.9% of members are from elsewhere in the world

THE PERNICIOUS ANAEMIA SOCIETY
Year ended 31 March 2023
CHAIR'S REPORT (continued)

Website analytics

Page Views 299,524

Users 102,805

New Users 92%

Sessions 137,509

Av Session Duration 00:02:36

Pages/Session 2.18

How did they find us?

Organic Search 75%

Direct 18%

Social Media 3%

Referral from other sites 4%

Most visited pages:

1. Homepage
2. Symptoms
3. What is Pernicious Anaemia?
4. Testing for Pernicious Anaemia
5. B12 deficiency and pernicious anaemia
6. Treatment
7. Diagnosis
8. Symptoms Checklist
9. Long covid and PA
10. Personal stories

THE PERNICIOUS ANAEMIA SOCIETY
Year ended 31 March 2023
CHAIR'S REPORT (continued)

Geo website visits

UK 55.1%

USA 26.4%

Australia 5.4%

Canada 2.2%

Ireland 1.3%

India 1%

Social Media

Facebook 8.7K likes • 9.1K followers

Instagram 800 followers

Twitter 1,655 Following (people/organisations followed by the charity) - 2,747 Followers (those who follow the charity)

The Future

We face a challenging 12-18 months as we await the outcome of NICE and restructure the organisation of the Society post Martyn Hooper's departure. There are also challenges as donations to small charities are generally decreasing and our membership remains static. However, we have a small but committed team of volunteers and a few trustees who are willing to help and share their guidance for the Society.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2023

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing Document

The Pernicious Anaemia Society is a registered charity and company limited by guarantee, governed by its Memorandum and Articles of Association. In accordance with the constitution of the company every member undertakes to contribute £1 to the company's assets should it be wound up.

Recruitment and Appointment of the Management Committee.

The directors of the company are also charity trustees for the purpose of charity law. All trustees give their time voluntarily and receive no benefits from the charity for their roles. The trustees appoint the members of the Management Committee, based on the skills and experience they feel will be of benefit to the charity.

Appointment of Directors/Trustees

As set out in the company's Articles of Association, the directors/(trustees) may, by ordinary resolution, appoint a person willing to serve in that capacity.

Induction and Training

New directors undergo a period of orientation to brief them on: their legal obligations under charity and company law, the Charity Commission guidance on public benefit and inform them of the content of the Memorandum and Articles of Association, the Committee and decision-making process, the current business plan and the recent financial performance of the organisation. They are encouraged to attend appropriate training events where these will facilitate the undertaking of their role.

Organisation

The board of trustees, which has a minimum of 5 members but no maximum, administers the organisation.

The day to day operations are delegated to the management committee members as and when necessary.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2023

Trustees' responsibilities in relation to the financial statements

The charity trustees (who are also the directors of the Pernicious Anaemia Society for the purposes of company law) are responsible for preparing a trustees' annual report and financial statements in accordance with applicable law for each financial period which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure of that period.

In preparing those financial statements, the trustees are required to select suitable accounting policies, as described on pages 13 to 15, and then apply them consistently, observe the methods and principles in the Charities SORP and make judgements and estimates that are prudent and reasonable. The trustees must also prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial statements comply with the Charities Act 2011. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud or other irregularities.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charity's website.

RISK MANAGEMENT

The Management Committee has conducted a review of the major risks to which the charity is exposed. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces.

FINANCIAL REVIEW

The financial statements reflect the charity's activities for the year ended 31 March 2023. At the year end the movement on unrestricted funds amounted to a net deficit of £54,177 compared to a deficit for 2022 of £15,468.

The net movement on restricted funds amounted to a surplus of £4,671 compared to a surplus of £2,829 for 2022.

INVESTMENT POLICY

The trustees, having regard to the liquidity requirements of operating the society, have kept any surplus day to day funds in an interest bearing bank deposit account.

THE PERNICIOUS ANAEMIA SOCIETY
Report of the Trustees for the year ended 31st March 2023

RESERVES POLICY

The Management Committee has examined the charity's requirements for reserves in light of the main risks to the organisation. It has established a policy whereby the unrestricted funds not committed or invested in tangible fixed assets held should be between 3 and 6 months of average unrestricted expenditure.

The unrestricted general funds at 31 March 2023 excluding fixed assets, amounted to £11,300 compared to £64,180 at 31st March 2022.

The charity has a reasonable expectation that the charity has adequate resources to continue operating for the foreseeable future.

EMPLOYEE MATTERS

As the charity has no employees it does not yet have a policy in place relating to employee matters. The activities of the charity are carried out by unpaid volunteers.

By order of the board of trustees

.....
K Burchell

Approved by the trustees on: 16 September 2023

THE PERNICIOUS ANAEMIA SOCIETY

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE PERNICIOUS ANAEMIA SOCIETY

Year ended 31 March 2023

I report to the charity trustees on my examination of the accounts of The Pernicious Anaemia Society for the year ended 31st March 2023.

Responsibilities and basis of report

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

Independent examiners' statement

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

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

the accounts do not accord with those records; or

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

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 & 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.

Helen Rumsey FCA
Ensors Accountants LLP
Connexions
159 Princes Street
Ipswich, IP1 1QJ

Date 26 October 2023

THE PERNICIOUS ANAEMIA SOCIETY

Statement of Financial Activities

Year ended 31 March 2023

	NOTE	Unrestd Funds £	Restd Funds £	2023 TOTAL £	2022 TOTAL £
Income and Endowment from:					
Grants and donations		10,576	3,858	14,434	12,602
Gift Aid		3,852	783	4,635	5,504
Charitable Activities	2	25,385	-	25,385	29,901
Investments		192	30	222	6
Total		40,005	4,671	44,676	48,013
Expenditure on:					
Charitable activities	3	94,182	-	94,182	63,481
Total		94,182	-	94,182	63,481
Net (deficit)/surplus		(54,177)	4,671	(49,506)	(15,468)
Reconciliation of Funds					
Total funds brought forward		69,370	2,829	72,199	87,667
Total funds carried forward		15,193	7,500	22,693	72,199

The statement of financial activities includes all gains and losses for the year
All incoming resources and resources expended derive from continuing activities

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

THE PERNICIOUS ANAEMIA SOCIETY

Balance Sheet as at 31st March 2023

			2023		2022
	NOTE	£	£	£	£
Fixed Assets					
Tangible assets	6		3,893		5,190
Current Assets					
Debtors	7	2,533		673	
Cash at Bank		50,578		67,321	
			<u>53,111</u>	<u>67,994</u>	
Creditors: amounts falling due within one year	8	<u>(12,100)</u>		<u>(985)</u>	
Net Current Assets			41,011		67,009
Creditors -falling due in more than one year			(22,211)		-
Net Assets			<u>22,693</u>		<u>72,199</u>
Unrestricted funds			15,193		69,370
Restricted fund			7,500		2,829
Total Funds			<u>22,693</u>		<u>72,199</u>

For the financial year ended 31 March 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 charitable company to obtain an audit of the accounts for the year in question in accordance with section 476.

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

These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

These financial statements were approved by the trustees and are signed on their behalf by:

.....
K Burchell

.....
David Connell-Smith

Date: ...16 September 2023

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

Notes to the accounts

Year ended 31 March 2023

1 Accounting Policies

Basis of accounting

The accounts have been prepared in accordance with 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 the Republic of Ireland (FRS102).

The charity is a public benefit entity as defined by FRS102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy notes.

The accounts are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these accounts are rounded to the nearest £.

The accounts have been prepared on the going concern basis as the trustees have a reasonable expectation that the charity has adequate resources to continue operating for the foreseeable future.

Fund accounting

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity and which have not been designated for other purposes.

The restricted fund represents a fund started for research into the relationship between Stomach Cancer and Pernicious Anaemia. It will continue to grow until it reaches £10,000 when it will be handed over to Professor Mark Pritchard.

Fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is provided to write off the cost of fixed assets over their useful lives at the rate of 25% on a reducing balance basis.

Impairment of assets

At each reporting date the charity reviews the carrying amounts of its tangible assets to determine whether there is any indication that those assets have suffered any impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of impairment loss, (if any).

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2023

Income

Income is recognised when there is entitlement to the funds, any performance conditions attached to the item have been met, it is probable that the income will be received and the amount can be measured reliably and it is not deferred.

Grants and donations are included when received.

Gift Aid is included on an accruals basis

Income from charitable activities is shown gross with associated costs included as charitable expenditure. The income is accounted for when received.

Expenditure

Expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party, it is probable that settlement will be required, and the amount of the obligation can be measured reliably.

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities.

Governance costs include those costs associated with meeting the constitutional and statutory requirements of the charity and include the fees for the independent examination.

Other expenditure represents those items not falling into any other heading.

Cash at bank and in hand

Cash at bank and in hand represents highly liquid funds held in bank accounts.

Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments.

Basic financial instruments are recognised in the Balance Sheet when the charity becomes party to the contractual provision of the instrument.

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2023

Accounting estimates and areas of judgment

Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. There are no critical accounting estimates.

2	Income	2023	2022
		£	£
	Charitable activities:		
	Membership Fees	25,385	28,373
	Insurance proceeds	-	1,528
		<u>25,385</u>	<u>29,901</u>
3	Expenditure	2023	2022
		£	£
	Charitable Activities:		
	Trustees' expenses	417	944
	Insurances	1,628	1,600
	Administration	407	1,450
	Communications	2,063	1,998
	Office costs	718	1,412
	Research Costs	31,244	12,587
	Website design and maintenance	12,309	11,067
	Motor expenses	-	293
	Car lease	1,244	3,566
	Symposium, conference costs	5,000	916
	Volunteer costs	478	-
	Promotion and fundraising	678	647
	Finance Charges	782	90
	Repairs and replacements	-	884
	Purchase of books	550	480
	Sundry costs	73	25
	Support Group costs	53	31
	Professional fees	31,006	22,660
	Depreciation	1,297	1,726
	Loss on disposals	-	270
	Governance - Independent examination	4,235	835
		<u>94,182</u>	<u>63,481</u>

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2023

4 Trustee remuneration and related party transactions

Travel costs of £417 were reimbursed to two trustees (2022: £944).

Mrs K Burchell was reimbursed for a payment of £600 for legal fees. She made a donation of £600 to the charity. Gift Aid of £150 was claimed on the donation.

Donations from two other trustees amounted to £60 (2022: Nil)

Mr M V Hooper MBE, a Director/Trustee, received £1,500 (to 9 May 2022) for consultancy work carried out (2022: Full year £18,000).

5 Taxation

As a charity, The Pernicious Anaemia Society is exempt from tax on income and gains received within the categories covered under Part 11 of the Corporation Taxes Act 2010 or section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

6 Tangible fixed assets

	Equipment £
Cost	
At 1 April 2022 and 31 March 2023	13,614
Accumulated depreciation	
At 1 April 2022	8,424
Charge for the year	1,297
At 31 March 2023	9,721
Net book value	
At 31 March 2023	3,893
At 31 March 2022	5,190

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2023

7 Debtors	2023	2022
	£	£
Gift Aid repayment	412	673
Prepayments	2,121	-
	<u>2,533</u>	<u>673</u>

All debtors relate to unrestricted funds.

8 Creditors: amounts falling due within one year.	2023	2022
	£	£
Creditors and accruals	<u>12,100</u>	<u>985</u>
These include an accrual of £8,500 for funding to University of Surrey (see note 11)		
More than 1 year	<u>22,211</u>	<u>-</u>
Representing the balance of funding to University of Surrey (see note 11)		

All creditors relate to unrestricted funds.

9 Allocation of funds

	UnRestd	Restd	TOTAL
	£	£	£
Fixed assets	3,893	-	3,893
Current assets	45,611	7,500	53,111
Current liabilities	(12,100)	-	(12,100)
Liabilities - due in more than one year	(22,211)	-	(22,211)
	<u>15,193</u>	<u>7,500</u>	<u>22,693</u>

Year ended 31 March 2022

	UnRestd	Restd	TOTAL
	£	£	£
Fixed assets	5,190	-	5,190
Current assets	65,165	2,829	67,994
Current liabilities	(985)	-	(985)
	<u>69,370</u>	<u>2,829</u>	<u>72,199</u>

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2023

10 Employee remuneration

There were no employees during the year ended 31 March 2023 (2022: Nil)

The charity relies on volunteer support to carry out its activities.

11 Funding commitments

The charity has committed to support a Phd student stipend for research at the University of Surrey for a period of 4 years. The agreement was entered into in October 2022 and will complete in March 2026.

The total funding of £30,711 has been included in creditors (see also note 8).

12 Post Balance Sheet events

In June 2023 the charity formally agreed to fund a research student at Norwich University at a cost of £2,300 per annum over a six year period.

THE PERNICIOUS ANAEMIA SOCIETY

Statement of Financial Activities Year ended 31 March 2022

	NOTE	Unrestd Funds £	Restd Funds £	2022 TOTAL £
Income and Endowment from:				
Grants and donations		12,602	-	12,602
Gift Aid		5,504	-	5,504
Charitable Activities	2	29,901	-	29,901
Investments		6	-	6
Total		48,013	-	48,013
Expenditure on:				
Charitable activities	3	63,481	-	63,481
Total		63,481	-	63,481
Net (deficit)/surplus		(15,468)	-	(15,468)
Reconciliation of Funds				
Total funds brought forward		84,838	2,829	87,667
Total funds carried forward		69,370	2,829	72,199

The statement of financial activities includes all gains and losses for the year
All incoming resources and resources expended derive from continuing activities

THE PERNICIOUS ANAEMIA SOCIETY

England & Wales - Charity number 1147839

Accounts

THE PERNICIOUS ANAEMIA SOCIETY
(A company limited by guarantee)

Report and Financial Statements
For the year ended 31st March 2022

Charity number	1147839
Company number	7904047

THE PERNICIOUS ANAEMIA SOCIETY
(A company limited by guarantee)

Financial Statements
For the year ended 31st March 2022

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Notes forming part of the financial statements	Pages 15 - 18

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2022

The management committee are pleased to present their annual directors' report with the financial statements of the charity for the year ended 31st March 2022 which are also prepared to meet the requirements for a directors' report and accounts for Companies Act purposes.

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 for Smaller Entities.

CHAIR'S REPORT

JAMES LIND ALLIANCE PRIORITY SETTING PARTNERSHIP ON PERNICIOUS ANAEMIA

On Thursday 16th December 2021 an online seminar was held to reveal and discuss the Top Ten "uncertainties" relating to the diagnosing and treatment of Pernicious Anaemia that had been identified by doctors, clinicians and patients by the Priority Setting Partnership we formed with the James Lind Alliance in the autumn of 2020. These Top Ten uncertainties were the product of a year's worth of online discussions between healthcare professionals, patients and others with an interest in improving the way in which pernicious anaemia is diagnosed and treated and each individual uncertainty will form the basis for a series of research projects that will ultimately not only improve the lived experience of patients with the disease, but also improve the diagnostic tools and processes that are used by doctors.

The Priority Setting Partnership (PSP) dominated the work of the Society, though we still managed to continue to provide information, advice and support for patients and their families and friends. And, whereas the cost of the PSP is usually £30-40,000, online meetings and seminars meant that transport and accommodation costs were a fraction of what they should have been and the whole process was completed for just under £10,000, the majority of which was paid in the essential consulting fees.

The importance of the Society undergoing the whole James Lind Alliance Priority Setting Partnership cannot be understated. After all, it addresses the main aim of the society that was established in the early days of the charity's existence which is namely to bring about improvements to the way in which patients are diagnosed and treated - not only for the patients' benefits but also to help doctors to do their job better. It was a lengthy and time-consuming process and, although the process is now complete, my focus is on bringing together researchers with an interest in the complex issues involved in diagnosing and treating the disease and facilitating meetings of these teams to apply for funding to take the ten uncertainties and produce answers to the questions relating to them. The process is now well underway but there is still a lot of work to be done.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2022

CHAIR'S REPORT (contd)

NATIONAL INSTITUTE FOR HEALTH AND CARE EXCELLENCE GUIDELINE ON VITAMIN B12 DEFICIENCY INCLUDING PERNICIOUS ANAEMIA.

In September of 2021 NICE began its scoping exercise to begin gathering evidence of the problems associated with the diagnosis and treatment of B12 deficiency which will include the biggest cause of any deficiency - pernicious anaemia. Although I was interviewed by NICE to take part in the project I was not selected because of a possible "conflict of interest". I will continue to provide NICE with any information and advice whenever I am asked as the process is well underway towards producing a guideline. As NICE will not look at any papers associated with the assays associated with B12 Deficiency and Pernicious Anaemia, I have been busy facilitating the publication of new-reviewed papers that will review past scientific papers that have addressed the problems with the diagnosis and to a certain extent the treatment of pernicious anaemia. It is hoped that these two papers will be published over the summer.

AGM 2021

The Annual General Meeting of the Society took place virtually on Saturday 11th September 2021

As well as working on the PSP and liaising with NICE, the Society still continued to provide help and support to patients and clinicians via the website, telephone helpline and support groups. The figures below give the statistics relating to the website along with details of the channels through which this help and support was provided.

Membership

Total members on 31st March 2022: 8,395

Gold	435
Silver	1,638
Bronze	108
Healthcare Affiliate	65
Legacy ²	6,149

²Legacy members are those who joined with a lifetime fee of £20. They do not incur any annual membership renewal fee.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2022

CHAIR'S REPORT (contd)

New members 01.04.21 - 31.03.22

Total	427
Gold	62
Silver	261
Bronze	98
HCA	6

HCA = Healthcare Professional Affiliates. HCA's are offered free membership if they are currently treating or working with patients with Pernicious Anaemia.

433 cancellations and expirations.

GEODEMOGRAPHICS

80% of members are from the UK	6,816
9.5% of members are from the US	802
2.8% of members are from AUSTRALIA	240
1.5% of members are from CANADA	129
1.3% of members are from IE	117
4.9% of members are from elsewhere in the world	291

Annual membership, website and social media report

Website analytics

Page Views	226,344
Users	74,084
New Users	85%
Sessions	100,893
Av Session Duration	00:02:40
Pages/Session	2.24

How did they find us?

Organic Search	71%
Direct	20%
Social Media	6%
Referral from other sites	3.60%

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2022

CHAIR'S REPORT (contd)

Source by city UK

London	6,713
Glasgow	1,314
Sydney	1,111
Manchester	1,007
Birmingham	997
Melbourne	951
Cardiff	833
Liverpool	749
Croydon	660

Pageviews

1 Symptoms of Pernicious Anaemia	27,226
2 Pernicious Anaemia Society (homepage)	16,561
3 What is Pernicious Anaemia	14,817
4 Diagnosis for Pernicious Anaemia	10,537
5 The difference between B12 Deficiency & Pernicious Anaemia	9,809
6 Treatment of Pernicious Anaemia	9,705
7 Symptoms Checklist	9,201
8 Testing for Pernicious Anaemia	8,346
9 Member Login	7,866
10 Long Covid and Pernicious Anaemia blogpost	7,400
11 PA Society the Diagnosis and Treatment	6,269
12 Who is most at risk?	5,956
13 Frequently asked questions about Pernicious Anaemia	5,800
14 Pernicious Anaemia and the Coronavirus blogpost	5,561
15 Leaflets and Articles about Pernicious Anaemia	4,657
16 B12 injections stopped in parts of UK due to Covid-19 virus	3,669
17 Member Home Page	3,542
18 Become a Member of the Pernicious Anaemia Society	3,407
19 Pernicious Anaemia Forum	3,285
20 Pernicious Anaemia information for healthcare professionals	2,905

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2022

CHAIR'S REPORT (contd)

Most viewed pages

Social Media

Facebook LinkedIn

Facebook Page Reach	22,280
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Facebook Page Likes	8,500
---------------------	-------

Facebook Page Visits	3,330
----------------------	-------

111 followers

Instagram

Instagram reach	1,262
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Instagram Followers	622
---------------------	-----

Instagram Profile Visits	2,219
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Top posts

The Coalition for Personalized Care has welcomed PAS with a profile of Martyn Hooper MBE - 6,499

Do you have Pernicious Anaemia? Please complete this short survey led by a team at De Montford University looking at COVID and long-COVID in people with Pernicious Anaemia - 5,371

Today's the day! The Top 10 Research Priorities for Pernicious Anaemia have been published - 4,243

A psychotherapist - and professional ballroom dancer - describes the challenges he faced getting diagnosed and treated for Pernicious Anaemia - 4,219

Yes! We now have the Top 10 Priorities for Pernicious Anaemia - 3,975

The Future

This will be my last report as Chairman of the PA Society. Recent health issues have meant that I now have to concentrate on transitioning to a new role as consultant and build on the good work of the James Lind Alliance Priority Setting Partnership, attend various conferences in the next nine months and generally liaise with external agencies, organisations and other charities that have a shared interest to some extent or another with this Society.

My thanks go to all those who have helped me over the last 17 years that I have been chairman.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2022

FINANCIAL REVIEW

The charity, with the aid of sound financial management and the support of volunteers, generated a very positive financial outcome for the year resulting in total funds of £48,013 (2021 = £46,939) being received.

INVESTMENT POLICY

The trustees, having regard to the liquidity requirements of operating the society, have kept any surplus day to funds in an interest bearing bank deposit account.

RESERVES POLICY

The Management Committee has examined the charity's requirements for reserves in light of the main risks to the organisation. It has established a policy whereby the unrestricted funds not committed or invested in tangible fixed assets held should be between 3 and 6 months of average unrestricted expenditure.

For this year, this would have amounted to between £15,500 - £31,000.

Excluding the investment in fixed assets at the year end of £5,190 the unrestricted general funds amount to £64,180 at 31st March 2022.

The reserves policy has therefore been satisfied at 31st March 2022.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2022

REFERENCE AND ADMINISTRATIVE INFORMATION

Charity Name	The Pernicious Anaemia Society
Charity registration number	1147839
Company registration number	7904047
Registered Office and operational address	Level 4 Brackla House Brackla Street Bridgend Glamorgan CF31 1BZ

Trustees

Martyn Vaughan Hooper MBE (Chair)	Resigned May 2022
Katrina Burchell (Acting chair)	
Michael John Stevenson	
David Connell-Smith (Company Secretary/Treasurer)	
Theresa Berta Taylor	
Norman Edward Thomas	
Dr Lenira Ferreira	
Dr Anna Guildford	
Dr Nicola Ward	Resigned October 2021
Elsie Dyer	
Nicola Allen	Resigned July 2021
Stephen Ganter	

Management Committee

Katrina Burchell
David Connell-Smith
Karyl Carter
Petra Visser

Company Secretary

David Connell-Smith

Independent Examiner

George A Kitcher FCA
Chartered Accountant
Regus. 15th Floor, Brunel House
Cardiff CF24 0EB

Bankers

National Westminster Bank Plc
28 Adare Street Bridgend
CF31 1EN

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2022

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing Document

The Pernicious Anaemia Society is a company limited by guarantee governed by its Memorandum and Articles of Association dated 10th January 2014. It is also a registered charity with the Charity Commission.

Recruitment and Appointment of the Management Committee.

The directors of the company are also charity trustees for the purpose of charity law. All trustees give their time voluntarily and receive no benefits from the charity for their roles.

Appointment of Directors/Trustees

As set out in the Articles of Association, the charity may by ordinary resolution appoint a person who is willing to act in that capacity.

Induction and Training

New directors undergo a period of orientation to brief them on: their legal obligations under charity and company law, the Charity Commission guidance on public benefit and inform them of the content of the Memorandum and Articles of Association, the Committee and decision-making process, the current business plan and the recent financial performance of the organisation. They are encouraged to attend appropriate training events where these will facilitate the undertaking of their role.

Organisation

The board of trustees, which has a minimum of 5 members but no maximum, administers the organisation.

The day to day operations are delegated to the management committee members as and when necessary.

RISK MANAGEMENT

The Management Committee has conducted a review of the major risk to which the charity is exposed. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Trustees for the year ended 31st March 2022

Trustees' responsibilities in relation to the financial statements

The charity trustees (who are also the directors of the Pernicious Anaemia Society for the purposes of company law) are responsible for preparing a trustees' annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice)

Company law requires the charity trustees to prepare financial statements in each 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 for that period. In preparing the financial statements, the trustees are required to:

- * select suitable accounting policies and then apply them consistently;
- * observe the methods and principles in the Charities SORP;
- * make judgments and estimates that are reasonable and prudent;
- * state whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- * 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 charity and to enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charity and hence taking reasonable steps for the prevention and detection of fraud or other irregularities.

The trustees are responsible for the maintenance of integrity of the corporate and financial information included on the charitable company's website. Legislation in the UK governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

Statement as to disclosure to the independent examiner

In so far as the trustees are aware at the time of approving our trustees' annual report:

- * there is no relevant information, being information needed by the independent examiner in connection with preparing their report, of which they are aware.
- * the trustees, having made enquiries of fellow directors that they ought to have individually taken, have each taken all steps that he/she is obliged to take as a director to make themselves aware of any relevant information and to establish that the independent examiner is aware of that information.

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF:**THE PERNICIOUS ANAEMIA SOCIETY**

I report on the accounts of the charity for the year ended 31st March 2022 which comprise the Statement of Financial activities, the Balance Sheet and related notes.

This report is made to the Trustees, as a body, in accordance with the terms of my engagement. My work has been undertaken so that I might carry out an Independent Examination of the financial statements in accordance with the General Directions given by the Charity Commissioners. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Charity and the Charity's Trustees, as a body, for my work or for this report.

RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

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

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

In connection with my examination, no matter has come to my attention:

- 1 which gives me reasonable cause to believe that in any material respect the requirements
 - * to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - * to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and reporting by Charities.

have not been met; or

- 2 to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Regus. 15th Floor Brunel House
2 Fitzalan Road
Cardiff CF24 0EB

George Kitcher FCA
Chartered Accountant
Date

The Pernicious Anaemia Society

Statement of Financial Activities (including Income and Expenditure Account) for the year ended 31st March 2022

	NOTE	Un/restd Funds £	Restd Funds £	TOTAL FUNDS £	2021 TOTAL FUNDS £
Incoming Resources from charitable activities:	1				
Grants	1	0	0	0	0
Voluntary Income		48,013	0	48,013	46,939
Total Incoming Resources		48,013	0	48,013	46,939
Resources expended	1				
Charitable activities	3	62,646	0	62,646	42,787
Governance costs	4	835	0	835	785
Total Resources Expended		63,481	0	63,481	43,572
Net Income for the Year		-15,468	0	-15,468	3,367
Reconciliation of Funds					
Total funds brought forward		84,838	2,829	87,667	84,300
Total funds carried forward		69,370	2,829	72,199	87,667

The statement of financial activities includes all gains and losses for the year.
All incoming resources and resources expended derive from continuing activities.

THE PERNICIOUS ANAEMIA SOCIETY

Balance Sheet as at 31st March 2022

				2021	
	NOTE	£	£	£	£
Fixed Assets	7				
Tangible assets			5,190		7,186
Current Assets					
Debtors	8	673		699	
Cash at Bank		67,321		80,702	
		67,994		81,401	
Creditors: amounts falling due within one year	9	-985		-920	
Net Current Assets			67,009		80,481
Net Assets			72,199		87,667
Unrestricted funds					
General funds	1		69,370		84,838
Restricted funds			2,829		2,829
Total Funds			72,199		87,667

The charitable company is entitled to exemption from audit under section 477 of the Companies Act 2006 for the year ended 31st March 2022.

The members have not required the charitable company to obtain an audit of its financial statements for the year ended 31st March 2022 in accordance with section 476 of the Companies Act 2006.

The trustees acknowledge their responsibility for:

- (a) ensuring that the charitable company keeps accounting records that comply with sections 386 and 387 of the Companies Act 2006 and
- (b) preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

THE PERNICIOUS ANAEMIA SOCIETY

Balance Sheet as at 31st March 2022 (contd)

These financial statements have been prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small charitable companies and with the Financial Reporting Standard for Smaller Entities (effective April 2008)

The financial statements were approved by the directors on

and signed on their behalf by:

.....

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2022

1 Accounting Policies

The principal accounting policies are summarised below. The accounting policies have been applied consistently throughout the year.

(a) Basis of accounting

The financial statements have been prepared under the historic cost convention and in accordance with the Companies Act 1985 and the Statement of Recommended Practice: Accounting and Reporting by Charities issued in March 2005

(b) Fund accounting

- * Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.
- * The restricted funds represents a fund started for research into the relationship between Stomach Cancer and Pernicious Anaemia. It will continue to grow until it reaches £10,000 when it will be handed over to Prof. Mark Pritchard.

(c) incoming resources

All incoming resources are included in the statement of financial activities when the charity is entitled to, and virtually certain to receive, the income and the amount can be quantified with reasonable accuracy. The following policies are applied to particular categories of income:

- * Subscriptions and donations are included when received.
- * Gift Aid is included on an accruals basis

(d) Resources expended

Expenditure is included on an accruals basis as a liability is incurred. Expenditure includes VAT which cannot be recovered and is reported as part of the expenditure to which it relates.

- * Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities.
- * Governance costs include those costs associated with meeting the constitutional and statutory requirements of the charity and include the fees for the independent examination.

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2022

(e) Depreciation

Depreciation is provided to write off the cost of fixed assets over their useful lives at the rate of 25% on a reducing balance basis.

2	Voluntary income	2022	2021
		£	£
	Donations and subscriptions	12,602	8,510
	Membership Fees	28,373	31,923
	Gift Aid receipts	5,504	6,476
	Interest	6	29
	Restricted Funds	0	1
	Insurance Proceeds	1,528	0
		48,013	46,939
3	Resources expended	2022	2021
		£	£
	Trustees' expenses	944	537
	Insurances	1,600	1,351
	Administration	1,450	3,096
	Communications	1,998	2,364
	Office costs	1,412	543
	Research Costs	12,587	98
	Website design and Maintenance	11,067	9,061
	Volunteer expenses	0	0
	Motor Expenses	293	331
	Conference/Open Day costs	916	228
	Depreciation	1,726	2,403
	Promotion/Fundraising	647	1,851
	Finance Charges	90	0
	Repairs, Additions, Replacements	884	1,829
	Purchase of Books	480	919
	Refreshments	25	0
	Support Group Costs	31	40
	Professional Fees	22,660	14,575
	Car Lease	3,566	3,561
	Loss on Disposals	270	0
		62,646	42,787

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2022

4	Governance costs	2022 £	2021 £
	Independent examination	835	785
	Annual General Meeting	0	0
		835	785

5 Trustee Remuneration & Related Party Transactions

Travel costs of £944 (2021 = £537) were reimbursed to trustees.

Mr. S Ganter, a Director/Trustee, received £nil (2021 = £600) for professional works undertaken during the year.

Mr M V Hooper MBE, a Director/Trustee, received £18,000 (2021 = £10,500) for consultancy work carried out during the year.

6 Taxation

As a charity, The Pernicious Anaemia Society is exempt from tax on income and gains received within the categories covered under Part 11 of the Corporation Taxes Act 2010 or section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

7 Tangible Fixed Assets

	Equipment £
Cost	
Balance as at 01.04.2021	15,811
Additions	0
Disposals	-2,197
Balance as at 31.03.22	13,614
Accumulated depreciation	
Balance as at 01.04.2021	8,625
Charge for the year	1,726
Eliminated on disposals	-1,927
Balance as at 31.03.22	8,424
Net book value	
At 31.03.22	5,190
At 31.03.21	7,186

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2022

8	Debtors	2022 £	2021 £
	Gift Aid repayment due	673	699

All debtors for 2022 and 2021 relate to unrestricted funds.

9	Creditors: amounts falling due within one year.	2022 £	2021 £
	Creditors and accruals	985	920

All creditors for 2022 and 2021 relate to unrestricted funds.

10 Allocation of Funds

	Un/Restd £	Restd £	TOTAL £
Fixed assets	5,190	0	5,190
Current assets	65,165	2,829	67,994
Current liabilities	-985	0	-985
	69,370	2,829	72,199

THE PERNICIOUS ANAEMIA SOCIETY

England & Wales - Charity number 1147839

Accounts

THE PERNICIOUS ANAEMIA SOCIETY
(A company limited by guarantee)

Report and Financial Statements
For the year ended 31st March 2021

Charity number	1147839
Company number	7904047

THE PERNICIOUS ANAEMIA SOCIETY
(A company limited by guarantee)

Financial Statements
For the year ended 31st March 2021

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THE PERNICIOUS ANAEMIA SOCIETY

Report of the Management Committee for the year ended 31st March 2021

The management committee are pleased to present their annual directors' report with the financial statements of the charity for the year ended 31st March 2021 which are also prepared to meet the requirements for a directors' report and accounts for Companies Act purposes.

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 for Smaller Entities.

CHAIR'S REPORT

The year 2020/2021 will be remembered as the time when the UK, like the rest of the world, saw normal life activities coming to an end due to the arrival of the Covid-19 virus; a world-wide pandemic was the result.

Just as the virus affected the economy in general it meant that the way in which the society operated had to change. The offices were closed and my travelling to meet with health decision makers and health researchers was ended abruptly. Meetings that had taken months to arrange were suddenly cancelled and hastily rearranged using Zoom conferencing. Soon, meetings became the new norm and gradually I began to carry on my work and that of the society via virtual conferences. We were to become overwhelmed by requests for help from members who had been told that their injections of replacement therapy B12 would be stopped for the foreseeable future due to the need to reduce face-to-face contact between nurses and patients (see below). Support Group meetings were cancelled though later on in the year some groups started to meet virtually which meant that the problem with members feeling isolated and alone was alleviated to a certain degree. Throughout the pandemic our Telephone Helpline and Website continued to carry on doing what they do - provide information, help and support to patients with pernicious anaemia and their friends and family.

The following website and related statistics relate to the financial year 2020/2021.

Membership

New members 01.04.20 - 31.03.21

Total	695
Gold	83
Silver	497
Bronze	115
HCA ¹	13

HCA = Healthcare Professional Affiliates. HCA's are offered free membership if they are currently treating or working with patients with Pernicious Anaemia.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Management Committee for the year ended 31st March 2021

CHAIR'S REPORT (contd)

Total members on 31st March 2021: 8,331

Gold	373
Silver	1,623
Bronze	121
Healthcare Affiliate	59
Legacy ²	6,155

²Legacy members are those who joined with a lifetime fee of £20. They do not incur any annual membership renewal fee.

GEODEMOGRAPHICS

81% of members are from the UK
9.6% of members are from the US
3% of members are from AUSTRALIA
1.5% of members are from CANADA
1.4% of members are from IE
3.5% of members are from elsewhere in the world

WEBSITE DATA

Page Views	814,886	
Users	317,961	(84% of those are new users)
Sessions	420,504	
Average time on the site	00:02:13	
Viewing avg.	2 pages	

Source of traffic per country

73%	UK
15%	US
3%	AUS
1.60%	Canada
1.50%	India
1%	Ireland
0.60%	South Africa
0.46%	Netherlands
0.40%	New Zealand
0.20%	Philippines

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Management Committee for the year ended 31st March 2021

CHAIR'S REPORT (contd)

Source by city UK

London	9%
Glasgow	2%
Birmingham	1.60%
Cardiff	1.50%
Liverpool	1.50%

How did they find us?

Organic Search	68%
Direct	21%
Social	8%
Referral	1.70%

Most viewed pages

Symptoms (page): 85,096 unique page views
B12 injections stopped due to Covid-19 (article): 68,105
B12 deficiency and PA (page): 40,383
Homepage: 30,113
What is pernicious anaemia?: (page) 23,938
Treatment of pernicious anaemia: (page) 19,591
Diagnosis: (page) 18,643
Who is most at risk? (page) 12,229
FAQ (page) 12,229
Symptom Checklist (article) 11,837

Most read news posts

1. BSH guidance on treating PA during Covid changed: 65,345 unique page views
2. Recent developments regarding injections being stopped: 45,414
3. COVID-19 and Pernicious Anaemia: 44,468
4. COVID-19: letter to the health ministers and injections being stopped 31,213
5. Continuing: Treating Pernicious Anaemia during COVID-19 5,699

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Management Committee for the year ended 31st March 2021

CHAIR'S REPORT (contd)

SOCIAL MEDIA

Facebook

Followers:

Reach: 33,695

Page Likes: 8.3k

Fans: men/women

Age: 45-54: 34%/ 35-44: 27.5%/ 55-64: 16.5%/ 25-34: 12%/ 65+: 8.5%

Countries: UK (68%) US (16%) AUS (4%) IE (2%) Canada (1.4%) NL (1%)

Most popular posts:

If you live in the UK, have Pernicious Anaemia, and your treatment has been changed during the pandemic, (survey link) 13.6k reach.

BSH guidance on B12 during COVID changed (link to news post) 8k.

Statement on current COVID pandemic and treatment being stopped: 6.2k (link to news post)

PA treatment during COVID (link to news post) 5.8k

@NHSGrampian suspended B12 injections in March 5.7k (shared from press)

Gloucestershire NHS tells patient to take tablets: (shared post) 4.6k

Join us! Become part of a society that is actively campaigning to change how Pernicious (post) 4.4k

Twitter

New followers: 162

Total impressions 110.135

Top tweets

@PASOC has written to all Chief Medical Officers

"We are aware that too many.....patients' B12 injections have been stopped;

Pernicious Anaemia patients risk permanent neurological damage if injections are discontinued (Evening Telegraph)

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Management Committee for the year ended 31st March 2021

CHAIR'S REPORT (contd)

Instagram

Reach:	299
Followers:	435
Women:	94%
Men:	6%
Countries:	UK(45%) US (12.6%) AUS (3%) IE (2.5%) France (1.1%)
Age:	35-44: 34%/ 45-54: 27%/ 25-34: 23%/ 55-64: 7.3%/ 18-24: 5%
Top post:	@PASOC has written to health ministers 347 reach

Linkedin (new March)

Followers:	79
UK	71.43%

Covid-19 and Pernicious Anaemia

The spread of the Covid-19 virus into the UK coincided with the new financial year. And it is fair to say that for the whole of the summer and early autumn, the consequences of the virus on the work of the society stretched our resources due to the following problems.

Treatment Stopped

During April and May we were inundated with telephone calls and emails from patients, or the families of patients, who had had their injections stopped due to the risk of cross contamination during the treatment process. These calls were often from very frightened and nervous people who were rightly worried about their symptoms worsening and faced the very real danger of suffering irreversible nerve damage. This was not helped by a statement issued by the British Society for Haematology who had issued a statement that said patients could "store B12 in their liver for a year or two." We immediately contacted the BSH and a Zoom meeting was arranged where two Healthcare professionals affiliated to this society also attended. It was pointed out that saying patients could store B12 was wrong. The statement was amended but by then the harm had been done. We issued our own statement soon after.

All through the summer months we were contacted about patients who were really struggling after their injections had been stopped. Some patients contacted us directly though it was often family members who turned to us for help. Some reported a return of symptoms, others reported neurological issues, incontinence, severe depression etc. Some of these stories shocked even us and it became clear that stopping injections was not an option. It was something that we discussed during several Zoom meetings with MPs in June.

CHAIR'S REPORT (contd)

NICE Guideline and the James Lind Alliance priority setting partnership

1. NICE Guideline on the Diagnosis and Management of pernicious Anaemia

During the Spring we asked our members to write to their elected representatives, at all levels, to ask him or her to write to the Director of Guidelines at NICE to make the planned Guideline on Pernicious Anaemia a priority. In September, we heard from NICE that they had commissioned the Guideline on the Diagnosis and Management of Pernicious Anaemia. This was announced two years after we had made our case to NICE that there was a need for such a guideline. There will now follow a two to three-year consultation in a series of meetings and workshops between clinicians, researchers and patients. Participants must be representatives of an institution or charity and must register as a Stakeholder for the Guideline.

A list of registered stakeholders can be seen here:

<https://www.nice.org.uk/guidance/gid-ng10176/documents/stakeholder-list>

2. James Lind Alliance

In October, we initiated a programme to fully evaluate just how effective different delivery methods were in treating Pernicious Anaemia. Nobody has ever investigated just how effective sub-lingual sprays and lozenges are in treating PA, nor has the nasal sprays, patches or ointments been evaluated. We contacted many of our Healthcare Affiliate members and set in motion the application process for a research grant to enable this research. We were told very early on that we would be ideal candidates for establishing a Priority Setting Partnership with the James Lind Alliance.

<https://www.jla.nihr.ac.uk>

We had a series of meetings online with officials of the JLA and then formed a Priority Setting Partnership which will use surveys to identify ten "uncertainties" relating to the Diagnosis and Treatment of Pernicious Anaemia. A Steering Group was set up and it was at these meetings that the first stages of identifying ten "uncertainties" surrounding the Diagnosis and Treatment of PA were discussed and a survey compiled. The aim is to identify ten "uncertainties" surrounding the diagnosis and treatment of pernicious anaemia and these uncertainties will be publicised as being in need of serious researching. The ten uncertainties should be published in early autumn 2021.

We have engaged two part-time self employed consultants to advise on the process and to analyse the data from the surveys.

I was appointed as a part-time self employed Expert Consultant to oversee and steer the development of the NICE Guideline on behalf of the Society. I continue my work as Chairman of the Society on a voluntary basis.

All three posts will be funded by a ring-fenced legacy from one of our late members.

Both the NICE Guideline and the JLA process are incredibly important developments that will

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Management Committee for the year ended 31st March 2021

CHAIR'S REPORT (contd)

hopefully bring about much-needed improvements in the way in which pernicious anaemia is both diagnosed and treated.

Annual General Meeting

The society's Annual general Meeting of Trustees was held online via Zoom in September 2020.

Management Committee

Also, in October 2020, the first Management Committee meeting was held. The Management Committee is made up of members who have experience in management positions and will be identifying the needs of the society for the next three to five years and putting in place a strategy to ensure that the society stays healthy in the long term.

Telephone Helpline Training

We continue to take calls from patients and their families as well as medical professionals even though the society's offices remain closed. This has been made possible by a new computer - based telephone system. We have successfully recruited volunteers to help us extend the hours that the telephone Helpline is available and in late October 2020, again using Zoom, we held our first telephone helpline training session. As we receive more offers to help, another session will be held that will enable us to offer an even better helpline service.

Patient Safety

The Recruitment to the NICE Guideline Stakeholder Group has meant that several teaching hospitals have contacted us and, in the middle of November, we were delighted to hear from the Head of Patient Safety at a large University Teaching Hospital, who wants to fully investigate just how patients are being harmed by their late diagnosis and poor treatment or non-treatment. We held an online meeting in the middle of November and another is scheduled for early January. We are highly optimistic that the issue of Patient Safety will be addressed in the NICE Guideline.

CluB12 - Global Conference

In late November 2020, an international conference was held via Zoom on "B12 Analogues and Possible Human Disease" We were delighted to be invited and though we were unable to comment on the incredibly complex science involved, we are positive that future research will

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Management Committee for the year ended 31st March 2021

CHAIR'S REPORT (contd)

be guided by the discussions that took place.

The Future

This is going to be an incredibly busy year with the James Lind Alliance to identify ten possible research programmes that address the uncertainties with the diagnosis and treatment of pernicious anaemia. That will involve a regular series of meetings, producing and collating evidence of uncertainties and will culminate in a full day workshop that will bring together (hopefully in person) all those who have volunteered to be part of the Priority Setting Partnership.

And then there's the NICE Guideline which will start to take form. Again, we will be attending regular workshops and other meetings to ensure that NICE are fully aware of the problems that we face as patients.

On top of dealing with these priorities, we will keep on providing information, advice and support to our members and their families and friends via telephone calls, emails and support group meetings. And as the year progresses it is envisaged that the Management Committee will start to become more involved with the work of the society.

Martyn Hooper MBE
Chairman

FINANCIAL REVIEW

The charity, with the aid of sound financial management and the support of volunteers, generated a very positive financial outcome for the year resulting in total funds of £46,939 (2020 = £116,038) being received.

INVESTMENT POLICY

The trustees, having regard to the liquidity requirements of operating the society, have kept any surplus day to funds in an interest bearing bank deposit account.

RESERVES POLICY

The Management Committee has examined the charity's requirements for reserves in light of the main risks to the organisation. It has established a policy whereby the unrestricted funds not committed or invested in tangible fixed assets held should be between 3 and 6 months of average unrestricted expenditure.

For this year, this would have amounted to between £13,500 - £27,000.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Management Committee for the year ended 31st March 2021

RESERVES POLICY (Contd)

Excluding the investment in fixed assets at the year end of £7,186, the unrestricted general funds amount to £77,652 at 31st March 2021.

The reserves policy has therefore been satisfied at 31st March 2021.

REFERENCE AND ADMINISTRATIVE INFORMATION

Charity Name	The Pernicious Anaemia Society
Charity registration number	1147839
Company registration number	7904047
Registered Office and operational address	Level 4 Brackla House Brackla Street Bridgend Glamorgan CF31 1BZ

Management Committee

Martyn Vaughan Hooper MBE (Chair)
Michael John Stevenson (Secretary)
David Connell-Smith (Treasurer)
Theresa Berta Taylor
Norman Edward Thomas
Louise Jones
Dr Lenira Ferreira
Dr Anna Guildford
Dr Nicola Ward
Elsie Dyer
Nicola Allen
Katrina Burchell (Appointed 12.09.2020)
Stephen Ganter (Appointed 12.09.2020)

Secretary

Michael John Stevenson

Independent Examiner

George A Kitcher FCA
Chartered Accountant
Regus. 15th Floor, Brunel House
Cardiff CF24 0EB

Bankers

National Westminster Bank Plc
28 Adare Street Bridgend
CF31 1EN

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Management Committee for the year ended 31st March 2021

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing Document

The Pernicious Anaemia Society is a company limited by guarantee governed by its Memorandum and Articles of Association dated 10th January 2014. It is also a registered charity with the Charity Commission.

Recruitment and Appointment of the Management Committee.

The directors of the company are also charity trustees for the purpose of charity law and under the company's Articles are known as the Management Committee. All members of the Management Committee give their time voluntarily and receive no benefits from the charity for their roles.

Appointment of Directors/Trustees

As set out in the Articles of Association, the charity may by ordinary resolution appoint a person who is willing to act in that capacity.

Induction and Training

New directors undergo a period of orientation to brief them on: their legal obligations under charity and company law, the Charity Commission guidance on public benefit and inform them of the content of the Memorandum and Articles of Association, the Committee and decision-making process, the current business plan and the recent financial performance of the organisation. They are encouraged to attend appropriate training events where these will facilitate the undertaking of their role.

Organisation

The board of trustees, which has a minimum of 3 members but no maximum, administers the organisation.

The day to day operations are delegated to the Chair who liaises with the other board members as and when necessary.

RISK MANAGEMENT

The Management Committee has conducted a review of the major risk to which the charity is exposed. Where appropriate, systems or procedures have been established to mitigate the risks the charity faces.

THE PERNICIOUS ANAEMIA SOCIETY

Report of the Management Committee for the year ended 31st March 2021

Trustees' responsibilities in relation to the financial statements

The charity trustees (who are also the directors of the Pernicious Anaemia Society for the purposes of company law) are responsible for preparing a trustees' annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice)

Company law requires the charity trustees to prepare financial statements in each 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 for that period. In preparing the financial statements, the trustees are required to:

- * select suitable accounting policies and then apply them consistently;
- * observe the methods and principles in the Charities SORP;
- * make judgments and estimates that are reasonable and prudent;
- * state whether applicable UK accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- * 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 charity and to enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charity and hence taking reasonable steps for the prevention and detection of fraud or other irregularities.

The trustees are responsible for the maintenance of integrity of the corporate and financial information included on the charitable company's website. Legislation in the UK governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

Statement as to disclosure to the independent examiner

In so far as the trustees are aware at the time of approving our trustees' annual report:

- * there is no relevant information, being information needed by the independent examiner in connection with preparing their report, of which they are aware.
- * the trustees, having made enquiries of fellow directors that they ought to have individually taken, have each taken all steps that he/she is obliged to take as a director to make themselves aware of any relevant information and to establish that the independent examiner is aware of that information.

By order of the board of trustees

Date:

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF:

THE PERNICIOUS ANAEMIA SOCIETY

I report on the accounts of the charity for the year ended 31st March 2021 which comprise the Statement of Financial activities, the Balance Sheet and related notes.

This report is made to the Trustees, as a body, in accordance with the terms of my engagement. My work has been undertaken so that I might carry out an Independent Examination of the financial statements in accordance with the General Directions given by the Charity Commissioners. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Charity and the Charity's Trustees, as a body, for my work or for this report.

RESPECTIVE RESPONSIBILITIES OF TRUSTEES AND EXAMINER

The trustees (who are also the directors of the company for the purposes of company law) are responsible for the preparation of the accounts. The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

Having satisfied myself that the charity is not subject to audit under company law and is eligible for independent examination, it is my responsibility to:

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

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

In connection with my examination, no matter has come to my attention:

- 1 which gives me reasonable cause to believe that in any material respect the requirements
 - * to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - * to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and reporting by Charities.

have not been met; or

- 2 to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Regus. 15th Floor Brunel House
2 Fitzalan Road
Cardiff CF24 0EB

George Kitcher FCA
Chartered Accountant
Date

The Pernicious Anaemia Society

Statement of Financial Activities (including Income and Expenditure Account) for the year ended 31st March 2021

	NOTE	Un/restd Funds £	Restd Funds £	TOTAL FUNDS £	2020 TOTAL FUNDS £
Incoming Resources from charitable activities:	1				
Grants	1	0	0	0	0
Voluntary Income		46,938	1	46,939	116,038
Total Incoming Resources		46,938	1	46,939	116,038
Resources expended	1				
Charitable activities	3	42,787	0	42,787	48,558
Governance costs	4	785	0	785	954
Total Resources Expended		43,572	0	43,572	49,512
Net Income for the Year		3,366	1	3,367	66,526
Reconciliation of Funds					
Total funds brought forward		81,472	2,828	84,300	17,774
Total funds carried forward		84,838	2,829	87,667	84,300

The statement of financial activities includes all gains and losses for the year. All incoming resources and resources expended derive from continuing activities.

THE PERNICIOUS ANAEMIA SOCIETY

Balance Sheet as at 31st March 2021

				2020	
	NOTE	£	£	£	£
Fixed Assets	7				
Tangible assets			7,186		3,864
Current Assets					
Debtors	8	699		463	
Cash at Bank		80,702		80,788	
		81,401		81,251	
Creditors: amounts falling due within one year	9	-920		-815	
Net Current Assets			80,481		80,436
Net Assets			87,667		84,300
Unrestricted funds					
General funds	1		84,838		81,472
Restricted funds			2,829		2,828
Total Funds			87,667		84,300

The charitable company is entitled to exemption from audit under section 477 of the Companies Act 2006 for the year ended 31st March 2021.

The members have not required the charitable company to obtain an audit of its financial statements for the year ended 31st March 2021 in accordance with section 476 of the Companies Act 2006.

The trustees acknowledge their responsibility for:

- (a) ensuring that the charitable company keeps accounting records that comply with sections 386 and 387 of the Companies Act 2006 and
- (b) preparing financial statements which give a true and fair view of the state of affairs of the charitable company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the charitable company.

THE PERNICIOUS ANAEMIA SOCIETY

Balance Sheet as at 31st March 2021 (contd)

These financial statements have been prepared in accordance with the special provisions of Part 15 of the Companies Act 2006 relating to small charitable companies and with the Financial Reporting Standard for Smaller Entities (effective April 2008)

The financial statements were approved by the directors on

and signed on their behalf by:

.....

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2021

1 Accounting Policies

The principal accounting policies are summarised below. The accounting policies have been applied consistently throughout the year.

(a) Basis of accounting

The financial statements have been prepared under the historic cost convention and in accordance with the Companies Act 1985 and the Statement of Recommended Practice: Accounting and Reporting by Charities issued in March 2005

(b) Fund accounting

- * Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the charity.
- * The restricted funds represents a fund started for research into the relationship between Stomach Cancer and Pernicious Anaemia. It will continue to grow until it reaches £10,000 when it will be handed over to Prof. Mark Pritchard.

(c) incoming resources

All incoming resources are included in the statement of financial activities when the charity is entitled to, and virtually certain to receive, the income and the amount can be quantified with reasonable accuracy. The following policies are applied to particular categories of income:

- * Subscriptions and donations are included when received.
- * Gift Aid is included on an accruals basis

(d) Resources expended

Expenditure is included on an accruals basis as a liability is incurred. Expenditure includes VAT which cannot be recovered and is reported as part of the expenditure to which it relates.

- * Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities.
- * Governance costs include those costs associated with meeting the constitutional and statutory requirements of the charity and include the fees for the independent examination.

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2021

(e) Depreciation

Depreciation is provided to write off the cost of fixed assets over their useful lives at the rate of 25% on a reducing balance basis.

2	Voluntary income	2021	2020
		£	£
	Donations and subscriptions	8,510	94,876
	Membership Fees	31,923	15,937
	Gift Aid receipts	6,476	3,876
	Interest	29	71
	Rent	0	500
	Restricted Funds	1	778
		46,939	116,038
3	Resources expended	2021	2020
		£	£
	Trustees' expenses	537	8,771
	Insurances	1,351	1,229
	Administration	3,096	1,703
	Communications	2,364	1,365
	Office costs	543	413
	Research Costs	98	266
	Website design and Maintenance	9,061	7,124
	Volunteer expenses	0	1,536
	Motor Expenses	331	0
	Conference/Open Day costs	228	13,587
	Depreciation	2,403	1,291
	Promotion/Fundraising	1,851	3,349
	Finance Charges	0	544
	Repairs, Additions, Replacements	1,829	2,478
	Purchase of Books	919	640
	Refreshments	0	241
	Support Group Costs	40	222
	Professional Fees	14,575	243
	Car Lease	3,561	3,556
		42,787	48,558

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2021

4	Governance costs	2021 £	2020 £
	Independent examination	785	780
	Annual General Meeting	0	174
		785	954

5 Trustee Remuneration & Related Party Transactions

Travel costs of £537 (2020 = £8,771) were reimbursed to trustees.

Mr S Ganter, a Director/Trustee, received £600 (2020 = £nil) for professional works undertaken during the year.

Mr M V Hooper MBE, a Director/Trustee, received £10,500 (2020 = £nil) for consultancy work carried out during the year.

6 Taxation

As a charity, The Pernicious Anaemia Society is exempt from tax on income and gains received within the categories covered under Part 11 of the Corporation Taxes Act 2010 or section 256 of the Taxation of Chargeable Gains Act 1992, to the extent that such income or gains are applied exclusively to charitable purposes.

7 Tangible Fixed Assets

	Equipment £
Cost	
Balance as at 01.04.2020	10,086
Additions	5,725
Sales	0
Balance as at 31.03.21	15,811
Accumulated depreciation	
Balance as at 01.04.2020	6,222
Charge for the year	2,403
Eliminated on disposals	0
Balance as at 31.03.21	8,625
Net book value	
At 31.03.21	7,186
At 31.03.20	3,864

THE PERNICIOUS ANAEMIA SOCIETY

Notes to the accounts

Year ended 31st March 2021

8	Debtors	2021	2020
		£	£
	Gift Aid repayment due	699	463
	Conference Deposit	0	0
		699	463

All debtors for 2021 and 2020 relate to unrestricted funds.

9	Creditors: amounts falling due within one year.	2021	2020
		£	£
	Creditors and accruals	920	815

All creditors for 2021 and 2020 relate to unrestricted funds.

10 Allocation of Funds

	Un/Restd	Restd	TOTAL
	£	£	£
Fixed assets	7,186	0	7,186
Current assets	78,572	2,829	81,401
Current liabilities	-920	0	-920
	84,838	2,829	87,667

