

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

Charity Registration Number: 1168722

Company Registration Number: 07029077

**REPORT OF THE TRUSTEES AND FINANCIAL STATEMENTS
FOR THE PERIOD ENDED 30 SEPTEMBER 2023**

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REFERENCE AND ADMINISTRATIVE DETAILS OF THE CHARITY, ITS TRUSTEES AND ITS ADVISERS FOR THE PERIOD ENDED 30 SEPTEMBER 2023

Trustees

The following persons served as Trustees during the period to the acceptance of this report:

Ms Chris Laszcz-Davis	Co-Chair
Mr Steven Angele Maurits Verpaele	Co-Chair
Mr Alan Leibowitz	Honorary Treasurer (re-elected 22 June 2022)
Dr Thomas P Fuller	IOHA Representative
Ms Ruth Jimenez Saavedra	Re-elected 22 June 2022
Dr Seymour Zachary Mansdorf	
Ms Lynn O'Donnell	Re-elected 22 June 2022
Dr David Zalk	
Dr Sharann Johnson	Re-elected 22 June 2022
Peter-John Jacobs	Elected June 2023

Company registration number 07029077

Charity registration number 1168722

Registered office 7 Faraday Court
First Avenue
Centrum 100
Burton on Trent
DE14 2WX

Website www.ohatrainig.org/

Advisers to the Trustees Mr Roger Alesbury
Mrs Nancy Manning McClellan
Mr David O'Malley
Mr Noel Tresider

Administration Services provided by: Fitwise Management Ltd

Bankers HSBC Bank Plc
1 St Peters Street
Derby, Derbyshire
DE1 2AE

Independent Examiner Nuvo Accountancy Limited
7 Faraday Court
First Avenue
Centrum 100
Burton on Trent
DE14 2WX

Solicitors Nelsons Solicitors
LLP Pennine House
6 Stanford Street
Nottingham NG1 7BQ

OHTA Advisory Committee

Mr Michael Connor	Co-Chair
Dr Albert J Tien	Co-Chair
Mr Jason Hodgkiss	
Mr Mark Katchen	
Mr Terry McDonald	
Mr Maharshi Mehta	
Dr Deborah Nelson	
Ms Lydia Renton	
Dr Jas Singh	
Mr Alex TSE Chun Kuen	
Mr Eduardo Shaw	(Joined September 2022)
Dr Kelly Johnstone	(Joined September 2022)

OHTA Awards and Qualifications Committee

Ms Lynn O'Donnell	Chair
Ms Andrea Hiddinga	
Mr Peter-John Jacobs	
Dr Sharann Johnson	
Mr Rene Leblanc	
Mr Alex TSE Chun Kuen	
Mr Kevin Bampton	

OHTA Online Training Co-ordinator

Mr David O'Malley	Chair
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Publicity/Marketing	Debbie Dietrich
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US Chapter Chair	Mark Katchen
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**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2023**

The Trustees have pleasure in presenting their report and accounts for the period ended 30 September 2023.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing Document

Incorporated on 24 September 2009 as a limited company by guarantee, the Occupational Hygiene Training Association (OHTA) was registered as a charity on 11 August 2016. The Trustees are governed by the Articles of Association incorporated 12 January 2015 as amended by special resolution dated 23 May 2016, and the Byelaws adopted on 2 March 2015.

Member Associations

According to the Articles of Association, membership is open to any organisation which is a member of the International Occupational Hygiene Association (IOHA) or is an awarding body under the National Accreditation Recognition (NAR) scheme or is otherwise granted membership by the Board. IOHA member associations are encouraged to join OHTA. Membership entitles the associations to vote at general meetings (including in the election of Directors of OHTA), and to contribute to the future direction of OHTA. In return the associations commit to support and promote the development and implementation of the OHTA international training and qualifications framework and encourage, promote and support the use of OHTA modules and qualifications within their area(s) of operation.

There were 33 member associations during the period.

The 2023 AGM was conducted as an online meeting on 7 June 2023 with votes cast in advance. All Member Associations registered prior to the AGM were invited to vote on the resolutions presented.

We thank each of our Member Associations for their involvement during the reporting period and look forward to continuing to develop our relationship as we move forward with OHTA's strategic aims.

Organisational Management

OHTA has a Board of up to 12 directors who are also the Charity Trustees. They manage the Charity through regular Board meetings and are responsible for strategic direction and policy. During the financial year the Board had up to 11 directors at any one time.

The Board is assisted by several committees as follows:

- 1) Established according to the Byelaws, the Advisory Committee provides constructive challenge to the Board as well as functioning in an advisory and support role. Michael Connor and Albert Tien were co-chairs of this committee for the period. The co-chairs are invited to attend Board meetings.
- 2) The Awards & Qualifications Committee advises the Board on matters relating to awards and qualifications and acts as the liaison between the NAR Awarding Bodies and OHTA. Each NAR Awarding Body was invited to nominate one person to represent them on the committee. Lynn O'Donnell is both chair of this committee and a director of OHTA.
- 3) The Online Training Delivery Task Group, chaired by David O'Malley continued throughout the period, with David O'Malley independently reviewing and approving all applications from existing ATP's to extend their delivery remit to online training.

Within these committees, OHTA benefits from the commitment and support of many global hardworking people who give their time and expertise voluntarily.

Secretariat support services were provided for the period by MCI UK Ltd, managed on a day to basis by Vicky Upstell (Senior Association Manager) and Laura Beard (Content Marketing Manager). Other members of the MCI team were also on hand to assist as and when required.

Director Recruitment and Training

Directors are either nominated by the Member Associations or co-opted for their specific skills or knowledge. Appointments are approved by the Member Associations at OHTA's Annual General Meeting. In addition, IOHA appoints a representative to be a director on the Board.

Under the requirements of the Articles of Association, at each AGM the three directors who have been longest in office since their last appointment must retire but can stand for re-election at the same meeting if they wish. If more than three directors were appointed (or re-appointed) on the same day, they must decide amongst themselves, or draw lots as to who should retire and/or stand for re-election. The IOHA representative on the Board is exempt from the retirement requirements.

The Board requires breadth and depth of experience to carry out its duties effectively and efficiently. When recruiting new directors the important attributes are an interest in the objectives and work of OHTA, knowledge and experience in IH/OH work globally, demonstrable leadership in a country specific organisation or association, and geographical and cultural diversity.

All new directors receive information about their responsibilities as company director and trustee, including the Charity Commission Guidance 'The Essential Trustee' and 'Charities and Public Benefit'. They have access to all previous Board paperwork and documents outlining the practices and procedures used by the Board for its operation and governance.

All directors give their time voluntarily and received no benefits from OHTA.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2023 continued**

CHARITABLE OBJECTS AND PUBLIC BENEFIT

OHTA's purpose as set out in the Object contained in the company's Articles of Association is *to protect and promote the health of the public by advancing the study and science of Occupational/Industrial Hygiene for the public benefit through the provision of training and education.*

For the purposes of the Object, Occupational/Industrial Hygiene means *the discipline of anticipating, recognising, evaluating and controlling health hazards in the working environment with the objective of protecting worker health and well-being and safeguarding the community at large.*

OHTA's aims are:

- developing educational and training materials
- promoting good standards of training to ensure effective health protection
- creating a sustainable model for worldwide training delivery
- developing a qualifications framework that permits international transferability of skills

The promotion of occupational/industrial health and hygiene is for the direct benefit of the working population worldwide and the indirect benefit of the whole population. OHTA's charitable activities focus on the provision of training and education in occupational/industrial hygiene with the aim of protecting worker health and well-being and safeguarding the community at large. OHTA raises awareness of the issues and helps to train people in occupational hygiene, equipping individuals with the skills necessary to control or prevent the exposures that lead to illness and death, thereby delivering an improved public benefit in reducing the incidence of ill-health caused or made worse by work.

OHTA has developed an international qualifications framework aimed at promoting good, consistent quality of training, encouraging international transferability of skills and qualifications, building capability close to the point of need, and creating a sustainable business model. The training and qualification scheme has no formal entry requirements and provides a modular way of building skills to match local needs. By promoting good standards of training and building capability close to the local point of need, OHTA provides access to occupational hygiene training for nations without a framework for training already in place. Some of the people trained will go on to obtain higher professional qualifications in occupational hygiene.

OHTA has developed educational and training materials which are available on OHTA's website, www.ohtatraining.org, and may be downloaded and used free of charge by students, employers and training providers. OHTA modules have been taught in over 50 countries. By ensuring there are no financial barriers to accessing the educational materials, OHTA's purpose is beneficial to all the public and particularly to those in poor and developing countries.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2023 continued**

OBJECTIVES, STRATEGY AND ACTIVITIES

OHTA's main objectives for the period were:

- continue to approve and support training providers in order to develop good standards of occupational hygiene training and increase access to such training across the world
- proactively support training providers and their students by introducing protocols for online (remote) training
- continue the editorial review of the modules to improve quality and relevance
- continue the development of new modules to expand training content across a broader range of occupational hygiene and other risk-related disciplines
- explore new methods of course delivery such as online, asynchronous, interactive self-study
- communicate regularly with stakeholders* to advocate take-up of the training and qualifications scheme, as well as to encourage donations/sponsorship
- develop collaborative relationships with like-minded organisations in pursuit of the shared goal of global prevention of worker illness and injury
- to build relationships with Member Associations new to IOHA, and thus to OHTA
- to increase marketing efforts to highlight the work of OHTA across the world

**Stakeholders included Member Associations, professional and governmental organisations, training providers, employers and students.*

Strategic Plan

Following discussions with MCI, it was decided that OHTA would seek an alternative secretariat provider to take over on 1 November 2023. OHTA sought tender submissions from alternative Association Management suppliers. These were reviewed by the Board of Trustees and Fitwise Management Limited was selected as the appointed supplier. A contract was signed for term of 1 November 2023 – 31 October 2027.

The Trustees confirm that they have referred to the information contained in the Charity Commission's general guidance on public benefit when reviewing OHTA's aims and objectives and in planning its future activities, and have complied with their duties under the Charities Act 2011. The Trustees regularly consider how planned activities will contribute to the aims and objectives they have set.

ACHIEVEMENTS AND PERFORMANCE

Training Activity

For the period 1 October 2022 to 30 September 2023 a total of 32 ATP's delivered 261 courses (figures taken from BOHS data provided to OHTA). The geographical spread of these providers included 7 in Australia and 9 in the UK and Ireland. The rest of the ATP's making up this number were in Canada, Ghana, India, Malaysia, New Zealand, , Nigeria, South Africa, and the US (the country is identified by the office location of the ATP).

BOHS data showed that 364 students took the W201 examination between 1 October 2022 and 30 September 2023, compared to 330 in the previous year. In the same period, 1,171 students sat W500 series examinations with BOHS, up from 1,107 in the previous year. BOHS reported that 1,242 examinations were taken online (77%) compared to just 296 in person (23%).

An indeterminate number of our course materials are also downloaded by organizations and used internally to deliver training, without taking the exams.

MARKETING AND COMMUNICATIONS

OHTA Newsletter

OHTA worked hard to develop the Global Link e-Newsletter during the reporting period and released 4 editions from 1 October 2022 to 30 September 2023, all of which are available to view on the OHTA website [here](#). The newsletters covered a wide range of topics including American Industrial Hygiene Conference (AIHCE) 2023, alongside some focus editions on Panama, USA and Malaysia.

Social Media and Outreach

During this period, OHTA continued to produce high quality content for their communications to enhance the both the profile and following of the association. OHTA emails saw a 36.6% open rate, however a far lower click through rate of 4.6%. On X (formally known as Twitter), average post impressions* were 442.4 per month, with 23 new followers throughout the course of the year. LinkedIn continued to be the associations most active of the two social media platforms, with monthly average post impressions* of 6,335, and average clicks of 306.5. During this period, the LinkedIn account also grew by 1,320 followers.

Unfortunately, the data set for the website** is incomplete, with no data available from 1st October 2022 until 13th April 2023. However, between 13th April 2023 and 30th September 2023, OHTA saw a total of 14,915 users with an average session duration of just under two minutes. The topmost viewed pages being the Homepage, the 'Training Resources/Training Materials', and 'Training Resources/Courses' pages.

*The number of times a user has been shown a piece of content, not necessarily interacted with it

**The old OHTA website which is no longer in use

PARTNERSHIPS AND COLLABORATION

BOHS remained the awarding body for OHTA modules, continuing to offer assessment for students undertaking the W201 and W500 series modules. Relationships continued with SAIOH and WHWB who were also authorised to offer W201 examinations.

In association with the Phylmar Academy, a number of courses were designed collaboratively, to be delivered by Phylmar, with promotion on both websites. Between the reporting dates, 263 people completed 'Fundamentals of Industrial Hygiene', 3 people completed Fundamentals of EHS (Workplace Safety) and 1 person completed the 'Occupational Health and Safety Overview'.

The National Institute for Occupational Safety and Health (NIOSH) has functioned as one of our course reviewers.

FINANCIAL REVIEW

The statement of financial activities shows unrestricted funds for the period of £130,890 (previous period £105,680). The surplus for the period is £25,210 (previous period deficit £3,654). OHTA received four donations, as well as additional income from the examining body levy. The main expenditure for the period was the professional support services contract and the transition to a new provider.

The Trustees consider the overall financial situation of the charity to be satisfactory.

RESERVES POLICY

OHTA maintains reserves, which are unrestricted, as part of its risk strategy. The level of reserves will be determined by the Board as part of the budget setting process. The minimum level of reserves will be determined by an assessment of risk, a review of contractual obligations, and a review of future income and expenditure.

The level of reserves will be maintained at a level which can cover the following commitments in the event of financial crisis or insolvency. This is considered to be:

- Funds to cover the remainder of payments (or notice period) of the professional support services contract.
- Funds to cover the remainder (or notice period) of any other contractual agreements.

PLANS FOR THE FUTURE

OHTA will continue to review their module content and make updates and improvements where required. The longer-term plan is to implement an OHTA managed online examination system by December 2024. This will be a move away from BOHS operated examinations.

The Trustees will continue to seek donations on behalf of OHTA from existing partnerships and new opportunities, whilst looking at other ways to generate additional funds to help the organisation continue to deliver its charitable aims.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES**

For the period ended 30 September 2023 continued

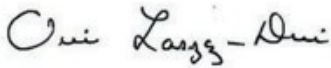
TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS

Law applicable to charities in England and Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the Charity's financial activities during the year and of its financial position at the end of the year. In preparing those financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures disclosed and explained in the financial statements; and;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for keeping accounting records which disclose with reasonable accuracy at any time the financial position of the Charity and 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 and other irregularities.

Approved by the Trustees and signed on their behalf by:



.....
Chris Laszcz-Davis
Co-Chair



.....
Steven Verpaele
Co-Chair

Approved by the Trustees on:

Date: 24th June 2024

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

Year ended 30 September 2023

I report on the accounts of the Trust for the year ended 30 September 2023 which are set out on pages 13 to 17.

Responsibilities and basis of report

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

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

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the Charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as Trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a "true and fair view" and the report is limited to those matters set out in the statement below.

Independent examiner's statement

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

1. accounting records were not kept in respect of the company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities.

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.

*Mr D Johnson FCCA
Nuvo Accountancy Limited*

*Chartered Certified Accountants
7 Faraday Court
First Avenue, Centrum 100
Burton Upon Trent
DE14 2WX*

Date: 24th June 2024

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

STATEMENT OF FINANCIAL ACTIVITIES

For the year ended 30 September 2023

	Notes	Total funds (unrestricted) 2023 £	Total funds (unrestricted) 2022 £
<u>Income</u>			
OHTA Course Levy		50,200	51,726
Donations & Sponsorship		23,947	22,211
Management Recharges		-	-
Interest received		-	-
Examining Body Levy		1,533	476
E-Learning		14,807	3,920
		<hr/>	<hr/>
Total income		90,487	78,333
		<hr/>	<hr/>
<u>Expenditure</u>			
Management charges	3	-	-
Charitable activities	4	2,970	2,562
Governance costs	4	62,307	79,425
		<hr/>	<hr/>
Total expenditure		65,277	81,987
		<hr/>	<hr/>
Net income/ (expenditure) before other recognised gains/losses		25,210	(3,654)
Other recognised gains/losses		-	-
		<hr/>	<hr/>
Net movement in funds		25,210	(3,654)
Total funds brought forward		105,680	109,334
		<hr/>	<hr/>
Total funds carried forward		130,890	105,680
		<hr/>	<hr/>

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

BALANCE SHEET

At 30 September 2023

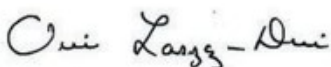
	Notes	2023 £	2022 £
Current assets			
Bank and Cash	118,831		93,024
Debtors	12,899		13,376
		<hr/>	<hr/>
	131,730		106,400
Current Liabilities			
Creditors: amounts falling due within one year	5	(840)	(720)
		<hr/>	<hr/>
Net current assets/ (liabilities)		130,890	105,680
		<hr/>	<hr/>
Total Assets less Current Liabilities		130,890	105,680
Creditors: amounts falling due after more than one year		-	-
		<hr/>	<hr/>
Net Assets		130,890	105,680
		<hr/>	<hr/>
Funds of the charity			
Unrestricted funds		130,890	105,680
		<hr/>	<hr/>
		130,890	105,680
		<hr/>	<hr/>

For the year ending 30 September 2023 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- The members have not required the company to obtain an audit in accordance with section 476 of the Companies Act 2006.
- The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts.
- These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

Approved by the Board of Trustees and signed on its behalf by:



Chris Laszcz-Davis
Co-Chair



Steven Verpaele
Co-Chair

Date: 24th June 2024

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

NOTES RELATING TO THE ACCOUNTS

Year ended 30 September 2023

1. Basis of preparation

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 for Smaller Entities published on 16 July 2014, the Financial Reporting Standard for Smaller Entities (FRSSE), and the Charities Act 2011 and applicable regulations.

The accounts have been prepared under the historical cost convention, with the exception that investments are valued at market value.

Consolidated accounts have not been prepared as the Charity qualifies for small accounts and the subsidiary is dormant.

2. Accounting policies

Income

All income is accounted for gross and when receivable.

Expenditure and Liabilities

Liability Recognition

Liabilities are recognised as soon as there is a legal or constructive obligation committing the Charity to pay out resources.

Governance Costs

Include costs of the preparation and examination of statutory accounts, the costs of Trustee meetings and cost of any legal advice to Trustees on governance or constitutional matters.

Grants payable without performance conditions

These are only recognised in the accounts when a commitment has been made and there are no conditions to be met relating to the grant which remain in the control of the Charity.

Support Costs

Support costs have been allocated to the activity based on staff time.

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

NOTES RELATING TO THE ACCOUNTS

Year ended 30 September 2023

			2023	2022
			£	£
3. Management Costs				
Investment management fees net of rebates			-	-
			<u> </u>	<u> </u>
4. Support Costs	Charitable Activity	Governance	2023 Total	2022 Total
	£	£	£	£
Independent examination & stat costs	-	840	840	720
Bank charges	162	-	162	134
Website and IT	207	-	207	1,129
BOHS Admin fee	1,255	-	1,255	1,299
Professional fees	-	59,537	59,537	78,705
Marketing fees	109	-	109	-
Translation	1,112	-	1,112	-
Legal fees	-	1,930	1,930	-
Sundry costs	125	-	125	-
	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	2,970	62,307	65,277	81,987
	<u> </u>	<u> </u>	<u> </u>	<u> </u>

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

NOTES RELATING TO THE ACCOUNTS

Year ended 30 September 2023

5. Creditors	2023 £	2022
<i>Within one year</i>		
Trade creditors	-	-
Other creditors	840	720
	<hr/>	<hr/>
	840	720
	<hr/>	<hr/>

6. Independent Examiner	2023 £	2022 £
Independent Examiner's fee	840	720
	<hr/>	<hr/>

7. Trustees Remuneration and Expenses

No member of the Board of Trustees, nor any person connected with any such member, has received or is due to receive, any remuneration or expense payment for the year, whether directly or indirectly, from the Charity's fund.

8. Other Information

Occupational Hygiene Training Association is a private limited company by guarantee without share capital and incorporated in England. Its registered office is:

Building 1000
Western Road
Portsmouth
Hampshire
PO6 3EZ