



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
Preoperative Association

No (if any)
1200997

CC16a

Receipts and payments accounts

For the period from	Period start date 01/12/2020	To	Period end date 31/03/2024
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Membership payments via stripe	5,802	-	-	5,802	
Insurance for cancelled conference	34,041			34,041	
AAGBI	8,572	-	-	8,572	
Consulting costs	440	-	-	440	
interest	463	-	-	463	
Foundation course delegate fees	55,011	-	-	55,011	
Conference delegate fees	20,733	-	-	20,733	
EMD reconciliation	59,894	-	-	59,894	
Sales nursing skills & guidelines	311			311	
Trade stand fees conference	12,100	-	-	12,100	
Sub total (Gross income for AR)	197,367	-	-	197,367	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	197,367	-	-	197,367	-
A3 Payments					
Board members expenses	210	-	-	210	
Stripe	21	-	-	21	
Foundation course expenses	3,463	-	-	3,463	
Website development	11,441	-	-	11,441	
Jane Jackson Foundation Course Presentation Slide Formatting	3,661	-	-	3,661	
AAGBI admin dees	8,695	-	-	8,695	
EMD monthly conference fees	11,532	-	-	11,532	
EMD course fees	9,704	-	-	9,704	
Conference invoices	119,598			119,598	
Conference board & speaker expenses	4,055			4,055	
Invoices foundation courses		-	-	-	
Sub total	172,380	-	-	172,380	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	172,380	-	-	172,380	-
Net of receipts/(payments)	24,987	-	-	24,987	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	158,754	-	-	158,754	-
Cash funds this year end	183,741	-	-	183,741	-

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Lloyds account	141,470	-	-
	Natwest account	42,271	-	-
		-	-	-
	Total cash funds	183,741	-	-
	account(s))	OK	OK	OK
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	Details	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Trustees' Annual Report for the period

From 14 November 2022 To 31 March 2024

Charity name: Preoperative Association

Charity registration number: 1200997

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	Charitable objects The objects of the society are: The advancement of health for the public benefit through improvements to patient safety by: (a) Education, information and support including the production of evidenced-based guidelines for inter-professional healthcare teams involved in preoperative assessment health checks and ensuring patients fitness for surgery (b) Education in the science and practice of preoperative assessment and medicine by the conduct of a conference, meetings, study days and training events (c) Promoting best practice through research, and the publication of the results such research, audit and consensus
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	1) Annual national conference 2) The leading providers of education courses for nurses and AHPs in the UK. We currently run two foundation courses annually at Chichester and Cheltenham and in 2025 will add an additional venue (Cardiff). 3) Agreement to deliver a university accredited level 7 Masters module in preoperative assessment with the University of West England. Launched in October 2024. 4) Provision of educational resources through website links, guidelines, and nursing guideline handbooks.
Statement confirming whether the trustees have had regard to the guidance issued by the Charity	Para 1.18	Information from GOV.UK website on roles and responsibilities of a charity trustee shared with all trustees including the 5 minute guide for charity trustees.

Commission on public benefit		
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Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	We don't currently offer grants, however due to our current financial position we will be looking to offer research and education grants in 2025, subject to a ratified policy on grants.
Policy on social investment including program related investment	Para 1.38	NA
Contribution made by volunteers	Para 1.38	All trustees hold voluntary positions including attending regular board meetings, AGM, organising and running the annual conference, teaching on study days and educational days and the everyday running of the charity such as those tasks undertaken by secretary and treasurer.
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	Partnership agreement with Centre of Perioperative Care (CPOC); working together we can support advanced multi-professional training in perioperative medicine and developing and updating national guidelines Masters module launched in October 2024 Expansion of the foundation course to 3 UK sites; new site Cardiff from 2025

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	We have achieved all current objectives as above.
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Performance of fundraising activities against objectives set	Para 1.41	Meeting fundraising targets which will allow further reinvestment into educational resources.
Investment performance against objectives	Para 1.41	From the profits, investments have been made e.g. developing and upgrading our educational resources
Other		

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	See summary of end of year accounts
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Any monies above the FSCS limit 85K will be held in a savings account/reinvested
Amount of reserves held	Para 1.22	See summary of end of year accounts
Reasons for holding zero reserves	Para 1.22	NA
Details of fund materially in deficit	Para 1.24	NA
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	NA

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	As above para 1.19
Investment policy and objectives including any social investment policy adopted	Para 1.46	As above para 1.22; 1.38; 1.41
A description of the principal risks facing the charity	Para 1.46	Competition from external organisations conflicting with our delivery of nurse education All trustees are volunteers
Other		

Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	CIO constitution
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Advert CV – distributed to board for review Shortlist Interview by 2 members of board

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	The Preoperative association
Other name the charity uses	N/A
Registered charity number	1200997
Charity's principal address	C/OThe Association of Anaesthetist of Great Britain and Ireland 21 Portland Place, London W1B 1PY

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Henry Murdoch	President		Preoperative Association board
2	Cathryn Eitel	Secretary		Preoperative Association board
3	Claire Robards	Treasurer		Preoperative Association board
4	Simon Lewis	Trustee		Preoperative Association board
5	Murthy Burra	Trustee	14.11.2022-19.06.2023	Preoperative Association board
6	Christina Reihill	Trustee		Preoperative Association board
7	Anjna Patel	Trustee		Preoperative Association board
8	Rob Hill	Past President		Preoperative Association board
9	James Durrand	Trainee Rep		Preoperative Association board
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Corporate trustees – names of the directors at the date the report was approved

Director name		
NA		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
NA		

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	NA
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	NA
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	NA

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Accountant	Prime Accountants Group.	5 Argosy Court, Scimitar Way, Whitley Business Park, Coventry, CV3 4GA

Name of chief executive or names of senior staff members (Optional information)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

NA

Other optional information

NA

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Henry Murdoch	
Position (eg Secretary, Chair, etc)	President	
Date		



**CHARITY COMMISSION
FOR ENGLAND AND WALES**

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name

Preoperative Association

**On accounts for the
period ended**

31 March 2024

**Charity no
(if any)**

1200997

Set out on pages

1 to 10

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended DD / MM / YYYY.

**Responsibilities and
basis of report**

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent
examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

* Please delete the words in the brackets if they do not apply.

Signed:

Date:

28/01/2025

Name:

Jeremy Kitson FCA

**Relevant professional
qualification or body:**

ICAEW

Address:

Prime Accountants

Corner Oak, 1 Homer Road, Solihull, B91 3QG

Section B**Disclosure**

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.