



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 1 April 2024 To 31 March 2025

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 preoperative assessment education courses for nurses and AHPs in the UK. We previously ran two foundation courses annually at Chichester and Cheltenham, an additional venue (Cardiff) has been added for 2025 and 2026. 3) Collaboration with University of West England and launch of the first university accredited level 7 Masters module in preoperative assessment in October 2024. This was successfully delivered, all except 1 student passed. The course will run annually, with the next module planned for September 2025.

		4) Provision of educational resources through website links, guidelines, and nursing guideline handbooks. 5) Launch of the first dedicated course for pharmacists working in preoperative assessment in January 2026 6) Launch of online webinars to support education and training, with investment in the digital systems to support delivery of these. 7) Formation of an Education Faculty comprising of anaesthetists, nurses and pharmacists to support with the delivery of all courses provided 8) Development of an expense policy for transparency and robust financial management 9) Marketing strategies to boost membership numbers which has progressively grown to 666 members 10) Website development to support membership benefits and engagement, with dedicated members access to guidelines, resources, webinar and conference recordings and presentations. 11) Fostering partnerships and continued collaboration with bodies such as The Royal College of Anaesthetists (RCoA), Centre of Perioperative Care (CPOC), Getting It Right First Time (GIRFT), Paediatric Perioperative Care (PPOC) and British Association Of Day Surgery (BADS) 12) Building new partnerships with societies such as Welsh Perioperative Medicine Network (W-POMS) and Scottish Perioperative Medicine Society (SPOMS)
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	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.

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. Agreement to offer up to £5,000 in grants, expected to launch September-October 2025.
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, webinars, educational days and the everyday running of the charity such as those tasks undertaken by secretary and treasurer.
Other		Payments may be made to Board members to facilitate delivery of educational courses at the discretion of the Board of Trustees

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 and successfully delivered in October 2024 Pharmacist course launch in January 2025 Expansion of the foundation course to 3 UK sites; new site Cardiff from 2025 Launch of online webinars to support education and training initiatives

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.
Performance of fundraising activities against objectives set	Para 1.41	Meeting fundraising targets which will allow further reinvestment into educational resources and grants.
Investment performance against objectives	Para 1.41	From the profits, investments have been made e.g. developing and upgrading our educational resources and purchasing an expense management software to

		streamline our financial operational processes.
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. An account with Shawbrook was opened in May 2025. Further investment will be made into an additional savings account.
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 – available as chargeable and free courses All trustees are volunteers Lack of resilience for delivery of education courses therefore forming and expanding an education faculty
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	Unit 9, Hydra Business Park, Nether Lane, Sheffield, S35 9ZX

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	Anjna Patel	President		Preoperative Association board
2	Henry Murdoch	Past President		Preoperative Association board
3	Cathryn Eitel	Secretary		Preoperative Association board
4	Claire Robards	Treasurer		Preoperative Association board
5	Simon Lewis	Trustee		Preoperative Association board
6	Rob Hill	Trustee		Preoperative Association board
7	Christina Reihill	Trustee		Preoperative Association board
8	Sarah Tinsley	Trustee	04.06.25-to date	Preoperative Association board
9	James Durrand	Trainee Representative	01.04.24-01.10.24	Preoperative Association board
10	Nisha Sriram	Trainee Representative	24.09.24-to date	Preoperative Association board
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)

--

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)	Anjna Patel	
Position (eg Secretary, Chair, etc)	President	
Date	06/11/2025	



Receipts and payments accounts

CC16a

For the period
from

1.4.24

To

31.03.25

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 period to the nearest £
A1 Receipts					
Foundation course delegate fees	36,915	-	-	36,915	55,011
Conference delegate fees	72,260	-	-	72,260	20,733
Conference trade stand fees	10,077	-	-	10,077	12,100
EMD reconciliation	38,038	-	-	38,038	59,894
Interest	849	-	-	849	463
Miscellaneous income	990	-	-	990	-
Stripe membership income	14,224	-	-	14,224	5,802
Sale nursing guidelines	1,305	-	-	1,305	311
Insurance for cancelled conference	-	#	-	-	34,041
AAGBI	-	-	-	-	8,572
Consulting costs	-	-	-	-	440
Refunds	1,264	-	-	1,264	-
	175,922	-	-	175,922	197,367
Sub total (Gross income for AR)					
	-	-	-	-	-
A2 Asset and investment sales, (see table).	-	-	-	-	-
	-	-	-	-	-
Sub total	175,922	-	-	175,922	197,367
Total receipts					
A3 Payments					
Foundation course expenses	12,028	-	-	12,028	3,463
Website & marketing	18,076	-	-	18,076	11,441
AAGBI admin invoices	5,207	-	-	5,207	8,695
EMD monthly conference invoices	8,276	-	-	8,276	11,532
MSc course expenses	4,243	-	-	4,243	3,661
EMD course fees	3,924	-	-	3,924	9,704
Board member expenses	55	-	-	55	210
Conference board & speaker expenses	2,711	-	-	2,711	4,055
Stripe	-	-	-	-	21
Conference Invoices	31,123	-	-	31,123	119,598
Refunds	275	-	-	275	-
	85,918	-	-	85,918	172,380
Sub total					
	-	-	-	-	-
A4 Asset and investment purchases, (see table)	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	85,918	-	-	85,918	24,987
	-	-	-	-	-
	-	-	-	-	-
Net of receipts/(payments)	90,004	-	-	90,004	24,987
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	183,741	-	-	183,741	158,754

Cash funds this year end

273,745		-	-	273,745	183,741
Details		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £	
Section B Statement of accounts		-	-	-	
Categories		-	-	-	
		-	-	-	
B1 Cash funds		Total cash funds 273,745	-	-	
(agree balances with receipts and payments account(s))		OK	OK	OK	
Details		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £	
		-	-	-	
		-	-	-	
		-	-	-	
B2 Other monetary assets		-	-	-	
		-	-	-	
		-	-	-	
Details		Fund to which asset belongs	Cost (optional)	Current value (optional)	
			-	-	
			-	-	
			-	-	
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 liability relates	Amount due (optional)	When due (optional)	
			-		
			-		
			-		
B5 Liabilities			-		
			-		
Signature		Print Name	Date of approval		
		Anjna Patel (President)	06/11/2025		



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
Preoperative Association

On accounts for the year
ended

31 March 2025

Charity no
(if any)

1200997

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 / 03 / 2025.

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 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.

Signed:

Date:

15 December 2025

Name:

Jeremy Kitson

Relevant professional
qualification(s) or body
(if any):

FCA

Address:

Prime Chartered Accountants

Corner Oak, 1 Homer Road

Solihull

West Midlands

B91 3QG