



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

**From:** 01.01.2021 **Period start date** **To:** 31.12.2021 **Period end date**

**Charity name:** Society for the Social History of Medicine

**Charity registration number:** 278414

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The objects of the Society set out in its Constitution are to advance the education of the public in the social history of medicine and in pursuance of that purpose to promote research and disseminate the results.
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	The charity's main activities in furtherance of its objects are the editing and production of a journal, <i>Social History of Medicine</i> <a href="https://academic.oup.com/shm">https://academic.oup.com/shm</a> which includes research articles and book reviews. Also, the production of a series of scholarly books, <i>Social Histories of Medicine</i> <a href="https://manchesteruniversitypress.co.uk/series/social-histories-of-medicine/">https://manchesteruniversitypress.co.uk/series/social-histories-of-medicine/</a> . The Society maintains an international membership, holds a biennial conference and sponsors selected other relevant scholarly conferences. The Society also represents the subject in relevant policy-making bodies. Publication in our outlets and attendance at conferences is open to non-members. Membership for students and the unwaged is subsidized with the added benefit of reduced conference charges. Support is also offered through bursaries for students and early career members to attend relevant conferences. With its activities the Society aims to foster understanding for and raise the profile of the social history of medicine both in the UK and internationally. This includes lobbying activities relevant to members, and more broadly, history of medicine as a discipline, and responding to issues in relation to the strategies of relevant funding bodies such as the Arts and Humanities Research Council, the Economic and Social Research Council or the Wellcome Trust. Funds raised from sales of the journal and other relevant publications enable the trustees to fund its commitments and maintain a financial reserve.
Statement confirming whether the trustees	Para 1.18	The trustees of the charity have paid due regard to the guidance published by the Charity Commission

have had regard to the guidance issued by the Charity Commission on public benefit		on public benefit. All trustees of the Society are volunteers. They are supported by paid, part-time administrative support which was put in place in April 2018.
--	--	---

### Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	
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	<p>In 2021 the charity endeavoured to continue its usual activities; however, some activities continued to be impacted by the Covid-19 pandemic. The Society's bi-annual conference (and 50<sup>th</sup> Anniversary commemoration) that was postponed in 2020 could not be re-scheduled for 2021 (it will take place in 2022). The Society could continue as usual with publication activities but there was little call to draw on the charity's reserves for conference grants and travel bursaries as conferences were either cancelled or postponed due to the pandemic.</p> <p><b>Membership</b> OUP Reports indicate that there were 236 members at the end of 2021, which is down on the previous year (292 members in 2020). The Covid pandemic with restrictions has prevented in person conferences which are useful in attracting</p>

		<p>new members. In terms of a breakdown for the membership figures for 2021, student membership remains consistent and forms 30% (30.3% in 2020; 38.7% in 2019; 30.7% in 2018) while individual membership figures are at 57% (55.5% 2020; 49.6% in 2019; 57.2% in 2018). The majority of our members continue to come from the UK at 58% (58.7% in 2020; 59.5% in 2019; 53.9% in 2018) while most of the remaining members are from North America at 16% (11.8% in 2020; 11.7% in 2019; 14.4% in 2018). European membership stands at 13% (15% in 2020; 14% in 2019; 14% in 2018).</p> <p>The membership rates for 2021 were: Student/Reduced: £26.00, \$51.00, €39.00. Regular: £48.00, \$97.00, €73.00. We have two members who do not subscribe via OUP and their payments are recorded in the accounts. From 2023 there will be a new membership rate with online only access to the journal.</p> <p><b>Publications</b></p> <p>The Society's journal <i>Social History of Medicine</i> has seen a slightly decreased number of submissions with 180 in 2021 (196 in 2020). The Society published 4 issues of the journal in 2021 with a total of 55 articles (56 in 2020) and a higher number of book reviews at 65 (58 in 2020), due to increased page allowance.</p> <p>The book series with Manchester University Press, <i>Social Histories of Medicine</i> continues to prosper with a total of 25 books and 2 in press. This year's publications were:</p> <p>Axel C. Hüntelmann and Oliver Falk (eds.) <i>Accounting for health. Calculation, paperwork and medicine, 1500–2000</i>. (January 2021).</p> <p>Anne Marie Rafferty, Marguerite Dupree and Fay Bound Alberti (eds.) <i>Germs and governance: The past, present and future of hospital infection, prevention and control</i>. (March 2021).</p> <p>Elma Brenner and François-Olivier Touati (eds.) <i>Leprosy and identity in the Middle Ages. From England to the Mediterranean</i>. (April 2021).</p> <p>Anne Hanley and Jessica Meyer (eds.) <i>Patient voices in Britain, 1840–1948</i>. (September 2021).</p>
--	--	--

		<p>Four digital issues of the Society's <i>Gazette</i> were produced and distributed via email to members and made available on the Society website.</p> <p><b><i>Conferences/Workshops</i></b>  The Society invites applications for conference funding three times a year. Only one SSHM grant totalling £250 was awarded in 2021 to support the following conference:</p> <p><i>Emotion, Embodiment and the Everyday, c.1500-1800</i>, Oxford, December 2021</p> <p>This was due to the continuing impact of the Covid-19 pandemic with restrictions. The society is still holding £1013 of funds awarded in 2020 for conferences that could not take place and will honour these awards for the re-scheduled events in 2022.</p> <p><b><i>Student and early career travel bursaries</i></b>  There were no travel bursaries awarded in 2021 due to Covid pandemic and restrictions with hardly any in-person conferences taking place. The Society is still holding £4460 of funds for travel bursaries awarded for the Society's postponed biennial conference in 2020. The Society will honour these awards for the re-scheduled conference in July 2022.</p> <p><b><i>Postgraduate Support and Training</i></b>  In response to the Covid-19 pandemic, the Society awarded a small number of Emergency Bursaries for PhD students and early career researchers who may have been impacted by the pandemic. A total of £195 was awarded in 2021 for the purchase of books and digital research material.</p> <p><b><i>Prize winners</i></b>  The Society awards an annual prize, the Roy Porter Essay Prize worth £500, for the best original unpublished essay in the social history of medicine. In 2021 the Society also awarded a further £200 (2 x £100) as prizes for short listed essays.</p> <p>The 2020 Roy Porter Essay Prize winner, as announced at the Society's AGM in 2021, was John Beales (Keele University and the Imperial War Museums). The</p>
--	--	---

		<p>winning essay was titled: 'Of One Blood?' Challenging perceptions of wartime blood donor motivation and behaviour: a case study of Bristol and the South West, 1939-1945'.</p> <p>A further two entrants also received recognition: Marsha Wubbles, (Wellcome-funded student at the University of Exeter), with 'A Weighty Matter: understanding fatness, weight-watching and the 'healthful Standard' in eighteenth-Century England'; and Lauren Killingsworth, (Yale University), "With Maps Illustrative of the Disease": Medical Cartography in Late Nineteenth-Century Colonial India'.</p> <p>There were a total of ten entrants.</p> <p>The winner of the 2021 Roy Porter Essay Prize will be announced at the AGM in July 2022.</p> <p><b>Web and Social Media</b></p> <p>Our website and social media continue to perform well. The website continues to have international reach, particularly to North America. Visitors to the website engaged with the whole site rather than just the 'home' page. However, the most visited page was 'Home', followed by 'Prizes' and the 'Journal'. The viewing statistics for 2021 were 21,420 views from 10,225 visitors. A decrease in the number of visitors to the website comparable to 2020 figures (28,231 views and 12,708). However, social media has continued to grow, with Twitter followers at 6429 followers (up from 5814) and Facebook at 3218 followers (up from 3100).</p>
--	--	--

#### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<p>In October 2021 the society applied for two grants from the Wellcome Trust. One for £25,000 to fund Society events (over 48 months). Our proposed programme of new and innovative events will allow us to begin new areas of work in the areas of anti-racism, mid-career support, and discussions about career precarity. Wellcome funds will enable bringing scholars together for physical meetings is essential to create the safe space needed for such sensitive discussions as anti-racism, facilitated by a clinical professional and academics experienced in this area, and regarding concerns about careers. The application was successful and grant funds are</p>
-------------------------------------	-----------	---

		<p>administered via the University of Strathclyde.</p> <p>Another grant application for £25,000 is to support the objective of directing funding to networking and networked events. These serial activities promise the space to be both innovative and sustained; a space that has often been limited in the field of the history of medicine and health. What these sustained conversations will do is provide room for creativity and thinking, offering transformative scholarship and assuredly facilitating links and work that would otherwise prove impossible, especially due to our current availability of £1500 per conference funding application, limited so as to support as many activities as possible. The Society plans to fund between four and seven networks with a maximum of £6000 per award, with two rounds of applications for support in 2022 and 2023. This application was also successful and will also be financially administered through the University of Strathclyde.</p>
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<p>The charity's assets increased during 2021, amounting to £125,531 in cash reserves at the end of the period. This is due to not being able to support conferences through funding and travel bursaries for students/early career as a consequence of pandemic restrictions.</p>
---	-----------	--

Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<p>The Society has a current policy of holding reserves to cover one year's cover cash flow requirements and for any potential gaps in income. In addition extra reserves are being held should the running of the journal be affected as a consequence of Plan S and publishers' commitment to transitioning their journals to open access through the Transformative Journal model <a href="https://www.coalition-s.org/plan-s-compliant-transformative-journals/">https://www.coalition-s.org/plan-s-compliant-transformative-journals/</a> The EC has set a total reserve of £60,000 until the impact is clear.</p> <p>Reserves are held in a savings account. The trustees recognise that the current level of reserves are higher than the set amount, due to the impact pandemic restrictions and are exploring ways of utilising excess reserves. From discussions at the 2020 AGM and at EC meetings, plans have been made to direct excess reserves towards more support to early career scholars and offer paid internships within the Society to support work to address issues of inclusivity and diversity in the field of the social history of medicine. Discussions and further proposals will be put forward in 2022.</p> <p>One new initiative from the discussions is the implementation of a book development prize (2 x £2000 prizes per year) for five years starting in 2022 to assist scholars and encourage the forming of book proposals in the social history of medicine.</p>
Amount of reserves held	Para 1.22	£119,208
Reasons for holding zero reserves	Para 1.22	
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	<p>The trustees have reviewed major risks. Procedures are in place to manage these risks. Income flow has been fairly steady over recent years, and as the Society does not have employees, risks are limited. Issues arising are discussed during Executive Committee meetings. The Committee meets three times per year.</p>

#### Additional information (optional)

You may choose to include further statements where relevant about:

	Para 1.47	<p>The charity is almost wholly reliant on the income generated by its journal and other publications. As detailed above, we re-invest much of this into promoting the</p>
--	-----------	--

The charity's principal sources of funds (including any fundraising)		subject through support for conferences and individual researchers.
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	The charity was formed by a written Constitution, which was last updated in 2012 and is available on the SSHM website <a href="https://sshm.org/portfolio/the-society/">https://sshm.org/portfolio/the-society/</a>
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	The charity is governed by its trustees, the elected members of the Executive Committee (EC), which meets at least three times a year.
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	The Chairperson and other officers are elected by the EC from their members. EC members must be members of the Society and are elected by the membership and serve a term of three years. The Officers of the Society are the Chair, Secretary and Treasurer and tenure of office is three years in each instance. Office holders may, at the end of their term of office, complete their term of EC membership. Office holders may also complete their tenure of office even if their elected period of membership of the Executive Committee has expired. Candidates for EC must be proposed and seconded by other members of the Society. The journal and book series editors are <i>ex officio</i> members of the EC (without voting rights) and are not trustees of the charity.



--	--	--

### 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	New Executive Committee members are directed to Charity Commission's guide, The Essential Trustee (CC3) which explains the main legal responsibilities trustees have. Also, to the National Council for Voluntary Organisations (NCVO) as a suggested resource to find out more about becoming a charity trustee.
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	Society for the Social History of Medicine
Other name the charity uses	
Registered charity number	278414
Charity's principal address	B45 Humanities, Dept of History University of Nottingham Nottingham NG7 2RD

## 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	Dr Rosemary Cresswell	Chair		
2	Dr Victoria Bates	Secretary		
3	Dr Anna Greenwood	Treasurer		
4	Dr Anne Hanley	EC Member	Stepped down 1 December 2021	
5	Dr Laura Kelly	EC Member		
6	Dr Cara Dobbing	EC Member		
7	Dr Rebecca Wynter	EC Member		
8	Dr Clare Hickman	EC Member	Re-elected 24 June 2021	
9	Dr Richard McKay	EC Member	Re-elected 24 June 2021	
10	Dr Stephen Mawdsley	EC Member		
11	Dr Samiksha Sehrawat	EC Member	Re-elected 24 June 2021	
12	Dr Lisa Smith	EC Member		
13	Dr Vanessa Heggie	EC Member		
14	Dr Claire Jones	EC Member		
15				
16				
17				
18				
19				
20				

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

Director name		

## Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

## Funds held as custodian trustees on behalf of others

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

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
Financial	Paul Cowham, MA, FCA, DChA	Green Fish Resource Centre, 46-50 Oldham Street, Manchester M4 1LE

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

--

## Exemptions from disclosure

Reason for non-disclosure of key personnel details

--

## Other optional information

### Statement of trustees' responsibilities

The trustees are responsible for preparing the annual report and the financial statements in accordance with applicable law and United Kingdom Generally Accepted Accounting Practice.

Law applicable to charities in England and Wales requires the trustees to prepare financial statements for each financial period which give a true and fair view of the state of affairs of the charity and of its incoming resources and application of resources of the period. In preparing financial statements giving a true and fair view the trustees should follow best practice and:

- select suitable accounting policies and then apply them consistently;
- make judgments 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 operation.

The trustees are responsible for keeping accounting records that disclose with reasonable accuracy the financial position of the charity and enable them to ensure that the financial statements comply with applicable law and the Constitution. They are responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

## Declarations

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

Signed on behalf of the charity's trustees

<b>Signature(s)</b>	<i>RBCresswell</i>	<i>Anna Greenwood</i>
<b>Full name(s)</b>	Rosemary Cresswell	Anna Greenwood
<b>Position (eg Secretary, Chair, etc)</b>	Chair	Treasurer
<b>Date</b>	1 July 2022	

# INDEPENDENT EXAMINER'S REPORT

## TO THE TRUSTEES AND MEMBERS OF THE SOCIETY FOR THE SOCIAL HISTORY OF MEDICINE

I report on the accounts for the charity for the year ended 31st December 2021 which are set out on pages 13 to 14 and have been prepared using the receipts and payments method.

### **Respective responsibilities of trustees and examiner**

The charity's trustees are responsible for the preparation of the accounts. The charity's 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.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- to follow the procedure 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 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 the course of 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 130 of the 2011 Act; and
- to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act

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.

*Paul Cowham*

Paul Cowham FCA DChA  
Green Fish Resource Centre  
46 - 50 Oldham St  
Manchester M4 1LE

07 / 12 / 2022

**THE SOCIETY FOR THE SOCIAL HISTORY OF MEDICINE**  
**Receipts and Payments Accounts**  
**FOR THE YEAR ENDED 31 DECEMBER 2021**

	2021	2020
		Total
<b>Receipts</b>		
<b>Income from charitable activities</b>		
Royalties OUP	24,249	25,471
Royalties Book Series	1,531	1,866
Editorial Retainer	3,768	7,536
Membership Fees	14	14
Conference income	0	0
Donations	0	254
Gift Aid on Donations	0	0
	29,562	35,141
<b>Investment income</b>		
Interest	7	67
<b>Total Receipts</b>	<b>29,569</b>	<b>35,208</b>
<b>Payments</b>		
Administration - Exec Secretary	3,406	4,166
Honoraria <i>SHM</i> Co-Editors	5,700	4,800
Editorial Assistants' Fees	600	165
Editorial Office Expenses (postage etc)	727	1,172
Editorial Board Meeting Expenses	0	0
Book Series Editorial Expenses	0	0
Executive Cttee Meeting Expenses	0	1,065
Website & Dropbox	250	291
Gazette, flyers, publicity	196	1,158
	10,879	12,817
Conference Grants	0	1,917
Bursaries	350	1,451
Essay Prize	700	1,000
	1050	4,368
Independent Examination	550	550
Bank Charges	123	123
Miscellaneous	0	600
	673	1,273
<b>Total Payments</b>	<b>12,602</b>	<b>18,458</b>
<b>Net of receipts/(payments)</b>	<b>16,967</b>	<b>16,750</b>
Bank+cash brought forward	108,564	91,815
Cash surplus/(deficit) in the year	16,967	16,750
Bank+cash carried forward	125,531	108,565

Please note: all funds are unrestricted funds

# THE SOCIETY FOR THE SOCIAL HISTORY OF MEDICINE

## STATEMENT OF ASSETS AND LIABILITIES AT THE END OF THE PERIOD

	2021	2020
	£	£
<b>Fixed assets</b>		
Tangible assets	0	0
	0	0
<b>Cash assets</b>		
Bank deposit account	66,441	66,434
Bank current account	59,090	42,131
	125,531	108,565
<b>Net cash assets</b>	125,531	108,565
<b>Net assets</b>	125,531	108,565
<b>Liabilities</b>	6,323	6,983
<b>Total assets at the end of the period</b>	119,208	101,582

Please note: all funds are unrestricted funds.

The charity's assets increased during 2021, bursaries (down by 76% from 2020 figures, which in themselves were 71% down from the previous year). Conference grants were down 100% as no conference grants were awarded due to Covid-19. In total the Society had £125,531 in cash reserves at the end of the period.

The Society needs reserves to cover cash flow requirements and potential gaps in income, as well as to fund future changes in the running of the journal. Reserves are held in a savings account. The trustees judge the current level of reserves to be adequate.

The trustees have reviewed major risks. Procedures are in place to manage these risks. Income flow has been fairly steady over recent years, and as the Society does not have employees, risks are limited. Issues arising are discussed during Executive Committee meetings. The Committee meets three times per year.