



Trustees' Annual Report for the period

From: 01.01.2022 **Period start date** **To:** 31.12.2022 **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> https://academic.oup.com/shm which includes research articles and book reviews. Also, the production of a series of scholarly books, <i>Social Histories of Medicine</i> https://manchesteruniversitypress.co.uk/series/social-histories-of-medicine/ . 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.
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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	
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>As detailed in each section below, in 2022 the charity resumed more fully its usual, although there was continued impact from the Covid-19 pandemic with a slow return to in person conferences and some travel restrictions still in place internationally. The Society's bi-annual conference (and 50th Anniversary commemoration) postponed from 2020 did take place in July 2022 at Swansea University. The Society continued as usual with publication activities producing an academic peer-reviewed journal and book series. The Society also held the first activities due to funding received from Wellcome Trust.</p> <p>Membership</p> <p>OUP Reports indicate that there were 190 members at the end of 2022, which is down on the previous year (236 members in 2021). A downward trend as a consequence of the continued impact of the</p>

		<p>Covid pandemic with restrictions and a slow return to in person conferences. Such events are useful in attracting new student members. In terms of a breakdown for the membership figures for 2022, student membership has fallen slightly remains and forms 27% (30% in 2021; 30.3% in 2020; 38.7% in 2019; 30.7% in 2018) while individual membership figures have risen slightly to 60% (57% in 2021; 55.5% 2020; 49.6% in 2019; 57.2% in 2018). Seniors make up 9% with developing countries at 3% and unwaged at 1%. For geographical location, the majority of our members continue to come from the UK, 60% in 2022, 58% in 2021, 58.7% in 2020; 59.5% in 2019; 53.9% in 2018) while most of the remaining members are from North America at 14% in 2022 (13% in 2021, 11.8% in 2020; 11.7% in 2019; 14.4% in 2018). European membership stands at about 10% (13% in 2021 15% in 2020; 14% in 2019; 14% in 2018). The membership rates for 2022 were: Student/Reduced: £27.00, \$53.00, €41.00. Regular: £50.00, \$101.00, €76.00. 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 at a 20% discounted rate on the print subscription.</p> <p>Publications</p> <p>The Society's journal <i>Social History of Medicine</i> received a similar number of submissions in 2022 with 182 (180 in 2021; 196 in 2020). The Society published 4 issues of the journal in 2022 with a total of 56 articles (55 in 2021) and book reviews at 65 (65 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 29 books and 2 in press. Since the last return books published were:</p> <p>Joris Vandendriessche and Benoît Majerus (eds.) <i>Medical histories of Belgium. New narratives on health, care and citizenship in the nineteenth and twentieth centuries.</i> (October 2021).</p> <p>Jennifer Crane and Jane Hand (eds.) <i>Placards, posters, and prescriptions: Cultural histories of the National Health Service in Britain</i> (June 2022).</p>
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	<p>Janet Weston and Hannah J. Elizabeth (eds.) <i>Histories of HIV/AIDS in Western Europe: New and regional perspectives</i>. (August 2022).</p> <p>Waltraud Ernst and Thomas Mueller (eds.) <i>Alcohol, psychiatry and society. Comparative and transnational perspectives, c. 1700-1990s</i> (October 2022).</p> <p>One new initiative is a book development award (a maximum of 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> <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>Conferences/Workshops</p> <p>The Society invites applications for conference funding three times a year. A total of £6368.00 in grants was awarded in 2022 to support conferences in the history of medicine (total paid out for 2022 = £1980 – made up of £250 from conference held in late 2021 plus £1730 from 2022 conferences). A total of £2013 from 2022 awards is carried over to 2023 as events were postponed and from the 2022 awards a total of £2625.00 is still to be claimed).</p> <p>Conference awards included:</p> <p>'Compassion and Care: Emotions and Experience in the care of Children through History' held at John Rylands Institute Manchester</p> <p>'Oxford History of Medicine at 50' held at Oxford University</p> <p>'Learning to Cut Bandage and Cure' held in Paris.</p> <p>The Society held its own biennial conference in July 2022 hosted by Swansea University. This was supported by the Wellcome and the Society supported student travel bursaries and keynote speakers. The Society also used funds to offer administrative support at the conference and to conduct an EDI assessment and report at the conference</p>
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		<p>and present an update on the Society's anti-racism workshop to conference delegates (recorded in EC expenses).</p> <p><i>Student and early career travel bursaries</i></p> <p>A total of £4459.88 in travel bursaries was paid for students and early career academics to attend and present papers at international and UK based conferences. The Society honoured awards for speakers awarded in 2020 who did eventually present at the Society's 2022 conference in Swansea.</p> <p><i>Prize winners</i></p> <p>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 2022 the Society also awarded a further £100 as prize for short listed essay.</p> <p>The 2021 Roy Porter Essay Prize winner, as announced at the Society's AGM in 2022 was Martijn van der Meer. The winning essay is titled: 'Sown without care: Dutch eugenicists and their call for optimising development conditions, 1919-1939'. The entry shortlisted for the essay prize was Margaret Williams's 'Searching for Care in a Segregated City: Detroit's Black Hospitals and the Integration of American Healthcare 1945-75'. There were a total of 8 entrants.</p> <p>The winner of the 2022 Roy Porter Essay Prize is scheduled to be announced in autumn 2023.</p> <p><i>Web and Social Media</i></p> <p>Our website and social media has continued to perform despite a transitional period between officers. The website continues to have international reach with the majority of site visitors from the UK, followed by the United States and is in line with previous years. Search engines and Twitter platform are the main routes people access the main website. The most visited sections of the website for visitors are the home page, followed by Calls for expressions of interest.</p> <p>Social media has continued to grow, with Twitter followers at 7009 followers (up from 6429) and Facebook has seen a decline in engagement but views have increased.</p>
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		<p>Wellcome Funded Events and Networks Grants</p> <p>As a result of the successful grant applications in 2021 (see additional information). The Society held its first event 4-5 July 2022 in Birmingham (UK) with a residential workshop on anti-racism. There were 30 attendees on each day. As a result, further events and initiatives are planned for 2023.</p> <p>The first round of Network Grant applications took place with a deadline of 31 May 2022. There were two awards of the Wellcome-funded Society for the Social History of Medicine Research Community Networks Both begin activities in 2023. Sarah Marks (Birkbeck, University of London), Kate Davison (University of Edinburgh), Katherine Hubbard (University of Surrey), Mo Moulton (University of Birmingham), Helen Spandler (University of Central Lancashire), & Rebecca Wynter (University of Amsterdam) - 'Twentieth-Century Psy-Disciplines and LGBTQIA+ Communities: Histories and Contexts of 'Conversion Therapies''</p> <p>Peder Clark (University of Strathclyde) & Jamie Banks (Loughborough University) - 'JOINT: An Early Career Drugs History Research Network. Establishing a drugs history research network for Early Career Researchers in the UK and Ireland'</p>
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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). The application was successful and grant funds are administered via the University of Strathclyde. 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.</p> <p>Another grant application for £25,000 was 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</p>
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		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.
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	The charity's assets increased during 2022, amounting to £127,822 in cash reserves at the end of the period. Although there has been an increase in applications for conference funding and travel bursaries, applications have not yet reached pre-pandemic levels.
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	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 https://www.coalition-s.org/plan-s-compliant-transformative-journals/ The EC

		<p>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 and 2021 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 2023.</p>
Amount of reserves held	Para 1.22	£123,728
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:

The charity's principal sources of funds (including any fundraising)	Para 1.47	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 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		

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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 updated in 2012 and again in 2022 and is available on the SSHM website https://sshm.org/portfolio/the-society/
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.
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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	University Of Kent School of History, Room N3 Rutherford College Canterbury Kent CT2 7NZ

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/EC Member	Stepped down as Chair on 1 July 2022	
2	Dr Victoria Bates	Secretary	Stepped down 1 July 2022	
3	Dr Anna Greenwood	Treasurer	Stepped down 1 July 2022	
4	Dr Beatriz Pichel	EC Member	Elected 1 July 2022	
5	Dr Laura Kelly	EC Member	Stepped down 1 July 2022	
6	Dr Cara Dobbing	EC Member	Stepped down 1 July 2022	
7	Dr Rebecca Wynter	EC Member	Re-elected 1 July 2022	
8	Dr Clare Hickman	EC Member	Stepped down 1 July 2022	
9	Dr Richard McKay	EC Member/Treasurer	Treasurer from 1 July 2022	
10	Dr Stephen Mawdsley	EC Member	Re-elected 1 July 2022	
11	Dr Samiksha Sehrawat	EC Member		
12	Dr Lisa Smith	EC Member/Chair	Chair from 1 July 2022	
13	Dr Vanessa Heggie	EC Member		
14	Dr Claire Jones	EC Member/Secretary	Secretary from 1 July 2022	
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)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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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;

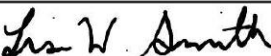

- state whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity 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

Signature(s)		
Full name(s)	Lisa Smith	Richard McKay
Position (eg Secretary, Chair, etc)	Chair	Treasurer
Date	22/9 /2023	

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 2022 which are set out on pages 15 to 16 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

28 Sep 2023

THE SOCIETY FOR THE SOCIAL HISTORY OF MEDICINE
Receipts and Payments Accounts
FOR THE YEAR ENDED 31 DECEMBER 2022

	2022	2021
	Total	Total
Receipts		
Income from charitable activities		
Royalties OUP	24,473	24,249
Royalties Book Series	1,218	1,531
Editorial Retainer	7,990	3,768
Membership Fees	14	14
	33,695	29,562
Investment income		
Interest	97	7
Total Receipts	33,792	29,569
Payments		
Administration - Exec Secretary	6,706	3,406
Honoraria <i>SHM</i> Co-Editors	6,000	5,700
Editorial Assistants' Fees	720	600
Editorial Office Expenses (postage etc)	674	727
Editorial Board & Book Series Editorial Expenses	1,501	-
Internships/Fellowships*	2,500	-
Executive Cttee Meeting Expenses	4,874	-
Website & Dropbox	216	250
Gazette, flyers, publicity	-	196
	23,191	10,879
Conference Grants	1,980	-
Bursaries	4,460	350
Essay Prize	888	700
	7,328	1,050
Independent Examination	550	550
Bank Charges	281	123
Miscellaneous	150	-
	981	673
Total Payments	31,500	12,602
Net of receipts/(payments)	2,292	16,967
Bank+cash brought forward	125,530	108,564
Cash surplus/(deficit) in the year	2,292	16,967
Bank+cash carried forward	127,822	125,531

Please note: all funds are unrestricted funds. *New item for 2022.

THE SOCIETY FOR THE SOCIAL HISTORY OF MEDICINE

STATEMENT OF ASSETS AND LIABILITIES

AT THE END OF THE PERIOD

	2022	2021
	£	£
Fixed assets		
Tangible assets	-	-
	-	-
Debtors – money owed to the charity	164	-
Cash assets		
Bank deposit account	66,537	66,441
Bank current account	61,285	59,090
Net cash assets	127,822	125,531
Net assets	127,986	125,531
Liabilities	4,258	6,323
Total assets at the end of the period	123,728	119,208

Notes: all funds are unrestricted funds. 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 <https://www.coalition-s.org/plan-s-compliant-transformative-journals/>. The EC has therefore set a total reserve of £60,000 until the impact is clear.

The charity's assets increased slightly during 2022, bursaries and conference grants were paid out after the Covid-19 pandemic but with some restrictions still in place at the start of the 2022, they did not reach pre-pandemic levels. In total the Society had £127,822 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 [see note above].

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.