



Trustees' Annual Report for the period

From: 01.01.2023 Period start date To: 31.12.2023 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	<p>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.</p>
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 2023 the charity resumed fully its usual activities. The Society continued with publication activities producing an academic peer-reviewed journal and book series. The Society also held activities and distributed networks funds due to funding received from Wellcome Trust.</p> <p>Membership Membership is linked to publication of the Society's journal and subscription to the journal constitutes membership of the Society. The publisher, Oxford University Press, report that there were 162 members at the end of 2023, which is down on the previous year (190 members in 2022). A downward trend continuing after the Covid-19 pandemic, not helped by the subsequent global issues of high inflation and cost of living pressures. With the Society's biennial</p>

		<p>conference in 2024 it is expected that membership numbers will increase as such events are useful in attracting new student members. In terms of a breakdown for the membership:</p> <p>Student membership remained consistent and formed 31% (27% in 2022, 30% in 2021, 30.3% in 2020; 38.7% in 2019; 30.7% in 2018) while individual membership figures formed 52% (60% in 2022; 57% in 2021; 55.5% 2020; 49.6% in 2019; 57.2% in 2018). The majority of our members continued to come from the UK at 66% (60% in 2022; 58% in 2021; 58.7% in 2020; 59.5% in 2019; 53.9% in 2018) while most of the remaining members were from North America and at 15% (14% in 2022; 16% in 2021; 11.8% in 2020; 11.7% in 2019; 14.4% in 2018). European membership stands at 9% (13% in 2021; 15% in 2020; 14% in 2019; 14% in 2018). So overall, membership by type and country is consistent.</p> <p>Membership (Print & Online)</p> <p>£53 \$106 €80 Developing Countries £25 \$47 €38 Student/Unwaged/Senior Rate £28 \$56 €43</p> <p>Membership with online only access to journal</p> <p>£42 \$85 €64 Developing Countries £20 \$38 €30 Student/Unwaged/Senior rate £22 \$45 €34</p> <p>Membership (2-year Print & Online)</p> <p>£101 \$201 €152 Developing Countries £58 \$72 €57 Student/Unwaged/Senior Rate £53 \$106 €82</p> <p>Membership (2-year online only)</p> <p>£80 \$162 €122 Developing Countries £38 \$72 €57 Student/Unwaged/Senior £42 \$86 €65</p> <p>We have two members who do not subscribe via OUP and their payments are recorded in the accounts.</p>
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		<p>As detailed above 2023 saw the Society's journal publisher (Oxford University Press) introduce new membership options with online only access to the journal at a 20% discounted rate on the print subscription as well as a two-year membership option.</p> <p>Publications</p> <p>The Society's journal <i>Social History of Medicine</i> received a similar number of submissions in 2023 with 176 (182 in 2022; 170 in 2021). The Society published 4 issues of the journal for 2023 (Volume 36) with a total of 25 original articles (56 in 2022) plus an introduction and second opinion for a special issue. Volume 36 number 4 November 2023 due to difficulties was prepared in 2023 but publication was delayed until 2024. There were 69 book reviews published in the 4 issues of volume 36 (65 in volume 35 in 2022), a greater number of reviews are currently being published due to an 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 35 books and 3 in press.</p> <p>The 2023 book development award (formerly prize) was launched earlier in the year with a new deadline of 15 March 2024. A maximum of 2 x £2000 prizes per year.</p> <p>Since the last return books published were:</p> <p>H. Hausse, <i>The Malleable Body: Surgeons, Artisans and Amputees in Early Modern Germany</i> (2023); A. Arnold-Forster, <i>Cold, Hard Steel. The Myth of the Modern Surgeon</i> (2023); W. Ruberg, L. Bergers, P. Dirven and S. Serrano Martnez (eds.) <i>Forensic Cultures in Modern Europe</i> (2023); G. Almond-Brown, <i>Spectacles and the Victorians: Measuring, Defining and Shaping Visual Capacity</i> (2023); M. Stanley-Baker (ed.) <i>Situating Medicine and Religion in Asia: Methodological Insights and Innovations</i> (2023).</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>
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		<p>The Society invites applications for conference funding three times a year. A total of £8767.01 in grants was awarded in 2023 to support conferences in the history of medicine (totals claimed for conference funding for 2023 = £4882.61 (made up of £3467.01 from 2023 awards and £1415.60 from conference awards made in 2022)).</p> <p>Conference awards included: 'Military Welfare History: what is it and why should it be considered?', University College, Dublin (July 2023).</p> <p>'Hospitals in Times of Crisis', University of Warsaw, Poland (May 2023).</p> <p>'Global Recipes in Early Modern Worlds: Ingredients, Actors and Exotica', University of Cambridge (May 2024).</p> <p>'There Will be Blood: The Medieval Blood Conference c.1000-1450', University of Cambridge (October 2023).</p> <p>'Health and Environmental Humanities' to be held at University of Bristol (August 2024).</p> <p>'Rethinking Injuries: Interdisciplinary Approaches to Harm, safety and society', Johns Hopkins University (March 2024).</p> <p>'Children's Worlds Through Time', Newcastle University (July 2024).</p> <p><i>Student and early career travel bursaries</i></p> <p>In 2023 a total of £3517.25 was awarded in travel bursaries for students and early career academics to attend and present papers at international and UK based conferences. A total of £2777.25 was claimed with £740.00 still to be claimed at the end of 2023 for awardees attending conferences in early 2024).</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. For the 2023 competition, the Society also awarded two further £100 prizes for short listed essays.</p>
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		<p>The 2022 Roy Porter Prize (awarded in 2023) recognised Anna Weerasinghe, Johns Hopkins University, for the essay 'In the Kitchen with Brianda Jaoa: Tacit Practices and Technologies of Healing in Garcia de Orta's Coloquios (1563)'. The shortlisted entries were: Silvia Maria Marchiori for 'Bridging Ancient and Humanist Medicine: The Early Medieval Manuscript of a Greek Speaking Latin Monk'; and Vesna Curlic (Edinburgh) for 'Returned to their Native Air: Migration, Disability and Climate in Britain, 1880-1905'.</p> <p>The Prize received eleven submissions, a higher number than the previous year</p> <p>The winner of the 2023 Roy Porter Essay Prize is scheduled to be announced in July 2024 at the Society's biennial conference.</p> <p>Web and Social Media</p> <p>The Society's website and social media has continued to perform with overall views to the website increased by 1500 views in 2023 compared to the previous two years with. 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. Social media has continued to grow, with the platform X (formerly Twitter) at 7286 followers (up from 7009). A new account has been set up on another platform BlueSky at the end of 2023 with 278 followers.</p> <p>Wellcome Funded Events and Networks Grants</p> <p>As a result of the successful grant applications in 2021 (see additional information).</p> <p>The Society held its second Wellcome grant supported event in June 2023 at Wroxton College, Oxfordshire UK with a residential workshop, 'Precarity in the Academy'. There were 49 attendees from the UK, Europe, China, Israel and India. The third and final event is planned for 2025.</p> <p>The second round of Network Grant applications took place in late 2023 with decisions announced in early 2024 with three networks receiving awards:</p>
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		<p>UK Disability History and Heritage Hub: UKDHHH Networking Events 2024-2025</p> <p>Mapping Public Health: Mapping health and wellbeing in London and beyond</p> <p>Military Welfare History Network: The military communities' medical welfare and care history conference series</p> <p>The two networks already running from the first round of awards: JOINT and Twentieth-Century Psy-Disciplines and LGBTQIA+ Communities had been paused by parental leave and extensions granted, but are now organising their first events for 2024.</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). 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 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.</p>
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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 2023 amounting to £128,691 in cash reserves at the end of the period.</p> <p>Applications in 2023 for conference funding and travel bursaries returned to pre-pandemic levels.</p>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<p>The Society's trustees have a policy of holding reserves to cover one year's cover cash flow requirements and for any potential gaps in income. In addition extra reserves of £60,000.00 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/ These reserves are held in a savings account.</p> <p>The trustees recognise that the current level of reserves are higher than the set amount, as a consequence of earlier pandemic conditions making conferences impossible. The trustees continue exploring ways of utilising excess reserves and have spent considerably more in 2023. Discussions and further proposals put forward by the executive Committee in 2023 are to direct excess reserves towards more support to early career scholars and</p>

		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. With the withdrawal of conference support from Wellcome Trust, the Society now has to support its own biennial conference at a host institution (support to the host institution in the region of £15,000). The trustees plan to utilise further reserves to assist members with the costs to attend the Society's next biennial conference in 2024 being held at University of Strathclyde in Glasgow in July 2024.
Amount of reserves held	Para 1.22	£121,049
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	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.

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, the Society re-invests much of its income 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		

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.
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 Lisa Smith	Chair/EC Member		
2	Dr Claire Jones	Secretary		
3	Dr Richard McKay	Treasurer		
4	Dr Beatriz Pichel	EC Member		
5	Dr Rosemary Cresswell	EC Member		
6	Dr Rebecca Wynter	EC Member		
7	Dr Stephen Mawdsley	EC Member		
8	Dr Samiksha Sehrawat	EC Member		
9	Dr Vanessa Heggie	EC Member	Re-elected 22 September 2023	
10	Dr Peder Clark	EC Member	Elected 22 September 2023	
11	Dr Manikarnika Dutta	EC Member	Elected 22 September 2023	
12	Felicity McKee	EC Member	Elected 22 September 2023	
13	Dr Martin Moore	EC Member	Elected 22 September 2023	
14	Dr Oisin Wall	EC Member	Elected 22 September 2023	
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	Withington Works, Withington Baths, 30 Burton Road Manchester, M20 3EB

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;

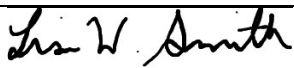

- state whether applicable accounting standards and statements of recommended practice have been followed, subject to any departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity 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	18/7 /2024	

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 2023 which are set out on pages 16 to 17 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
Withington Works
Withington Baths
30 Burton Road
Manchester, M20 3EB

25 July 2024

The Society for the Social History of Medicine
Receipts and Payments Accounts
For the year ending 31 December 2023

	2023	2022
	Total	Total
Receipts		
Income from charitable activities		
Royalties OUP	24,741	24,473
Royalties Book Series	1,628	1,218
Editorial Retainer	8,270	7,990
Membership Fees	14	14
	<u>34,653</u>	<u>33,695</u>
Investment income		
Interest	978	97
Total Receipts	<u>35,631</u>	<u>33,792</u>
Payments		
Administration - Exec Secretary	5,086	6,706
Honoraria <i>SHM</i> Co-Editors	6,000	6,000
Honoraria - speakers	500	-
Editorial Assistants' Fees	480	720
Editorial Office Expenses (postage etc)	1035	674
Editorial Board & Book Series Editorial Expenses	2,701	1,501
Internships/Fellowships*	3,400	2,500
Executive Cttee Meeting Expenses	3,042	4,874
Website & Dropbox	216	216
Gazette, flyers, publicity		-
	<u>22,460</u>	<u>23,191</u>
Conference Grants	7,431	1,980
Bursaries	2,777	4,460
Essay Prize	700	888
	<u>10,908</u>	<u>7,328</u>
Independent Examination	550	550
Bank Charges	285	281
Miscellaneous	559	150
	<u>1394</u>	<u>981</u>
Total Payments	<u>34,762</u>	<u>31,500</u>
Net of receipts/(payments)	<u>869</u>	<u>2,292</u>
Bank+cash brought forward	127,822	125,530
Cash surplus/(deficit) in the year	869	2,292
Bank+cash carried forward	<u>128,691</u>	<u>127,822</u>

The Society for the Social History of Medicine
Statement of assets and liabilities
For the year ending 31 December 2023

	2023	2022
	£	£
Fixed assets		
Tangible assets - microphones	1,198	-
Debtors – money owed to the charity	-	164
Cash assets		
Bank deposit account	67,515	66,537
Bank current account	61,176	61,285
Net cash assets	<u>128,691</u>	<u>127,822</u>
Net assets	129,889	127,986
Liabilities	8,840	4,258
Total assets at the end of the period	<u><u>121,049</u></u>	<u><u>123,728</u></u>