

Trustees' Annual Report 2021



CHARITY COMMISSION
FOR ENGLAND AND WALES

From 01/07/2020 To 30/06/2021

Charity name: British Association for Holistic Medicine & Health Care

Charity registration number: 289459

Objectives and Activities

	SORP	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	The Association is established to educate and inform doctors, medical students, other healthcare professionals and members of the general public in the principles and practice of compassionate holistic medicine and health care.
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	● Production of 3 journals annually ● Annual student essay competition ● Student ambassadors ● Workshops/webinars & retreats ● Real Food Campaign
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The trustees have regard to the guidance on public benefit when making decisions

Achievements and Performance

	SORP	
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	Our journal articles are more widely read. They have been taken up by EBSCO and old journals are free to download on our website. We had 1 new university sign up to stock our journal. Some articles are being made into blog posts and these are being read by a wide audience. Our 2020 student essay competition had the largest number of entries to date – 107 from 25 universities. This also led to an influx of student ambassadors and in Birmingham and Cardiff medical schools the setting up of 'holistic societies'. We also had interest from a handful of qualified practitioners wanting to become ambassadors.

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Our closing bank balance was nearly £29k with a surplus of nearly £18k this year
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	We are keeping £5k as a reserve though this is more than we would need to close our charity
Amount of reserves held	Para 1.22	£5,000

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	This year our funds were primarily from: • Membership • Journal subscriptions & EBSCO • Donations • Education Grant
Investment policy and objectives including any social investment policy adopted	Para 1.46	None
A description of the principal risks facing the charity	Para 1.46	We currently rely on large donations to continue to fund the journal. If we were unable to secure further donations then we would be unable to continue to publish it in its current printed format.

Structure, Governance and Management

Description of charity's trusts:		N/a
Type of governing document (trust deed, royal charter)	Para 1.25	Trust Deed
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Unincorporated association
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	A minimum of 50% of Trustees to be practicing or retired qualified healthcare professionals

Reference and Administrative details

Charity name	British Association for Holistic Medicine & Health Care
Other name the charity uses	BHMA (formerly 'British Holistic Medical Association')
Registered charity number	289459
Charity's principal address	27 Ivory House Clove Hitch Quay London SW11 3TN

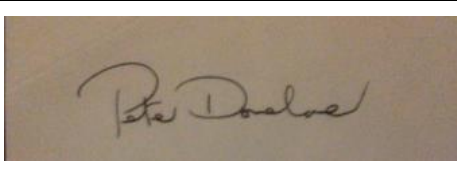
Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Peter Donebauer	Chair		
2	Dr Antonia Wrigley	Vice Chair		
3	Ian Henghes			
4	Dr Thuli Whitehouse			
5	Dr Andrew Sikorski			
6	Dr Adam Fazakerley		13/02/2021 -> current	
7	Darryl Edwards		13/02/2021 -> current	
8	Ciara Roberts		13/02/2021 – 07/06/2021	
9	David Balen		-> 01/05/2021	
10				

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)	Peter Donebauer	
	Position (eg Secretary, Chair, etc)	Chairman	
	Date	18th December 2021	

Charity Name	No (if any)
British Association for Holistic Medicine & Health Care	289459

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Receipts and payments accounts

For the period from	Period start date	To	Period end date
	01/07/2020		30/06/2021

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Membership subs	9,244	-	-	9,244	8,006
Donations	15,531	-	-	15,531	2,538
Education grant	-	5,000	-	5,000	-
Journal income	6,449	-	-	6,449	2,638
Other income	108	-	-	108	25
Gift Aid	7,322	-	-	7,322	-
Bank interest	1	-	-	1	3
Sub total (Gross income for AR)	38,655	5,000	-	43,655	13,210
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	38,655	5,000	-	43,655	13,210
A3 Payments					
Journal costs	12,411	-	-	12,411	11,661
Development costs	3,882	-	-	3,882	1,263
Administration costs	6,873	-	-	6,873	4,362
Website & Marcomms	913	-	-	913	709
Bank Fees	308	-	-	308	293
Accounts	455	-	-	455	-
Other costs	244	685	-	929	409
Repayment of loan	500	-	-	500	-
Sub total	25,586	685	-	26,271	18,697
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	25,586	685	-	26,271	18,697
Net of receipts/(payments)	13,069	4,315	-	17,384	- 5,487
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	11,554	-	-	11,554	17,041
Cash funds this year end	24,623	4,315	-	28,938	11,554

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

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash at bank	24,623	4,315	-
		-	-	-
		-	-	-
	Total cash funds	24,623	4,315	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities				
	Independent Examination	Unrestricted	455	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
		ANTONIA J WRIGLEY	13/01/2022	



Independent examiner's report on the accounts

Section A

Independent Examiner's Report

**Report to the trustees/
members of**

BRITISH ASSOCIATION FOR HOLISTIC MEDICINE & HEALTH CARE

**On accounts for the year
ended**

30/06/2019

**Charity no
(if any)**

289459

Set out on pages

1-7

**Respective
responsibilities of
trustees and examiner**

The charity's trustees consider that an audit is not required for this year (under section 43(2) of the Charities Act 1993 (the Act), as amended by s.28 of the Charities Act 2006) and that an independent examination is needed. It is my responsibility to:

- examine the accounts (under section 43 of the Act, as amended),
- to follow the procedures laid down in the General Directions given by the Charity Commission (under section 43(7)(b) of the Act, as amended), and
- to state whether particular matters have come to my attention.

**Basis of independent
examiner's statement**

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 the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the accounts.

**Independent
examiner's statement**

In the course of my examination, no matter has come to my attention which gives me reasonable cause to believe that in, any material respect, the trustees have not met the requirements to ensure that:

- proper accounting records are kept (in accordance with section 41 of the Act); and
- accounts are prepared which agree with the accounting records and comply with the accounting requirements of the Act; or

1. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Signed:

Joanne Trowbridge

Date:

13/01/2022

Name:

Joanne Trowbridge

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

MAAT

Address:

The Park, Daventry Road

Knowle, Bristol, BS4 1DQ

