

Trustees' Annual Report 2023**CHARITY COMMISSION
FOR ENGLAND AND WALES****From 01/07/2022 To 30/06/2023****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 • Conversion of articles into blog posts • Annual student essay competition • Creation of a course • Participation in conference
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 had an American University partner for a year and reached a wider audience. We have now converted many more of our articles into posts on our website and through social media We had a successful student 'essay' competition, for the second year taking creative submissions too. We worked hard this year to finish and launch our course 'The Holistic Practitioner' which gained accreditation from CPDUK. This is offered at low cost, especially to students. We were invited to be part of the annual 3-day conference – IPM Congress where our Real Food Campaign team gave a successful workshop.

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Our closing bank balance was approx £13.5k with a deficit of approx £2.5k 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 • Salem University contribution to journal • Donations
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

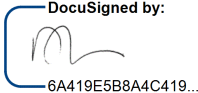
Names of the charity trustees who manage the charity

	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	Darryl Edwards			
6				
7				
8				
9				
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	Antonia wrigley
	Position (eg Secretary, Chair, etc)	Chair	
	Date	19th November 2023	



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

Receipts and payments accounts

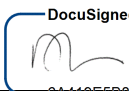
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For the period from	Period start date	To	Period end date
	01/07/2022		30/06/2023

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 year to the nearest £
A1 Receipts					
Membership subs	14,133	-	-	14,133	7,697
Donations	10,585	170	-	10,755	631
Education grant	-	-	-	-	-
Journal income	10,452	-	-	10,452	4,462
Course Income	65	-	-	65	-
Other income	153	-	-	153	2,481
Gift Aid	-	-	-	-	-
Bank interest	103	-	-	103	11
Sub total (Gross income for AR)	35,491	170	-	35,661	15,282
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	35,491	170	-	35,661	15,282
A3 Payments					
Journal costs	12,874	-	-	12,874	13,567
Development costs	8,959	-	-	8,959	3,089
Administration costs	10,782	-	-	10,782	5,411
Website & Marcomms	848	365	-	1,213	1,095
Bank Fees	281	-	-	281	318
Accounts	-	-	-	-	479
Other costs	413	3,787	-	4,200	4,004
	-	-	-	-	-
Sub total	34,157	4,152	-	38,309	27,963
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	34,157	4,152	-	38,309	27,963
Net of receipts/(payments)	1,334	- 3,982	-	- 2,648	- 12,681
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	12,276	3,982	-	16,258	28,938
Cash funds this year end	13,610	0	-	13,610	16,258

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	13,610	- 0	-
		-	-	-
		-	-	-
	Total cash funds	13,610	- 0	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
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 asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
	Independent Examination	Unrestricted	652	31 January 2024
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
	 0A419E5B8A4C418...	ANTONIA J WRIGLEY	31/1/2024	



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**

30/06/2023

**Charity no
(if any)**

289459

Set out on pages

1-5

**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:

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Date:

14/2/2024

Name:

Joanne Trowbridge

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

MAAT

Address:

The Park, Daventry Road
Knowle, Bristol, BS4 1DQ