



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees’ Annual Report 2023

From 01/07/2023 To 30/06/2024

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 • Blogs and other social content • Annual student essay competition • Holistic course • Partnering in events and planning own 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 published 3 further issues: • Health Creation and Creative Health Summer 2023 including an interview with Sir Nigel Crisp • Journeys into Medicine Winter 2023 • Many Ways of Knowing Spring 2024 Journals older than 20 months are available to download for free along with a number of articles published as blog posts. We’ve been telling our story, past, present and future across all digital and social channels, amplifying holism and increasing our reach.

		Our course has had some excellent feedback from doctors and other healthcare practitioners. We had a further successful student essay competition. We started planning our 40th anniversary conference to be held October 5th 2024 along with a series of webinars.
--	--	--

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	Our closing bank balance was £28,332
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	£5000
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	We have continued to function due to a large donation this year which should cover 2025 operations along with other revenue. However, we are urgently looking at changing our membership model to be more sustainable without donations.

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	We had a large sum left to us as a legacy this year. We have ongoing membership fees and journal subscriptions etc. New this year are course sales, conference ticket sales and some money from the Publisher's Licensing Service.
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 are looking to grow our membership base and income to be more sustainable. We hope to offer more next year and are looking for further donations to cover the cost of transitioning to a more sustainable model.

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. The trustees agree on suitability.

Additional information

Relationship with any related parties	Para 1.51	We are building relationships with organisations with a similar remit and will continue building on these.
---------------------------------------	-----------	--

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		Resigned 17/06/2024	
4	Dr Thuli Whitehouse			
5	Darryl Edwards			
6	Marina Malthouse		Co-opted 02/04/2024	
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)	DocuSigned by: Peter Donebauer A61BA0E16E3146C...		
			Full name(s)	Peter Donebauer	
			Position (eg Secretary, Chair, etc)	Chair	
		Date	29/10/2024		



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

Receipts and payments accounts			
For the period from	Period start date	To	Period end date
	01/07/2023		30/06/2024

CC16a

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	10,761	-	-	10,761	14,133
Donations	21,765	-	-	21,765	10,755
Journal income	6,262	-	-	6,262	10,452
Course Income	4,350	-	-	4,350	65
Other income	128	-	-	128	153
Gift Aid	6,038	-	-	6,038	-
Bank interest	369	-	-	369	103
Sub total (Gross income for AR)	49,673	-	-	49,673	35,661
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	49,673	-	-	49,673	35,661
A3 Payments					
Journal costs	13,614	-	-	13,614	12,874
Development costs	7,551	-	-	7,551	8,959
Administration costs	8,878	-	-	8,878	10,782
Website & Marcomms	1,479	-	-	1,479	1,213
Bank Fees	412	-	-	412	281
Accounts	652	-	-	652	-
Other costs	2,365	-	-	2,365	4,200
Sub total	34,951	-	-	34,951	38,309
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	34,951	-	-	34,951	38,309
Net of receipts/(payments)	14,722	-	-	14,722	- 2,648
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	13,610	-	-	13,610	16,258
Cash funds this year end	28,332	-	-	28,332	13,610

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	28,332	-	-
		-	-	-
		-	-	-
	Total cash funds	28,332	-	-
	(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	717	30 October 2024
Signed by one or two trustees on behalf of all the trustees		Signature	Print Name	Date of approval
 Signed by: 6A419E5B6A4C419...		ANTONIA J WRIGLEY	29/10/2024	



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Charity Name

BRITISH ASSOCIATION FOR HOLISTIC MEDICINE & HEALTH CARE

**On accounts for the year
ended**

30/06/2024

**Charity no
(if any)**

289459

Set out on pages

1-6

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 30/06/2024

**Responsibilities and
basis of report**

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent
examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention (other than that disclosed below *) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

** Please delete the words in the brackets if they do not apply.*

Signed:

Joanne Trowbridge

C2F8368E1B574EA...

Date:

30/10/2024

Name:

Joanne Trowbridge

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

MAAT

Address:

Bristol Community Accountants CIC

The Park, Daventry Road

Bristol, BS4 1DQ

Section B

Disclosure

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).