

# Form AR21

Trade Union and Labour Relations (Consolidation) Act 1992

## Annual Return for a Trade Union

Name of Trade Union:	British Orthoptic Society Trade Union		
Year ended:	31 December 2021		
List no:	530T		
Head or Main Office address:	3rd Floor		
	Interchange Place		
	151-165 Edmund Street		
	Birmingham		
Postcode	B3 2TA		
Website address (if available)			
Has the address changed during the year to which the return relates?	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>	('X' in appropriate box)
General Secretary:	Samantha Aitkenhead		
Telephone Number:	01217285633		
Contact name for queries regarding the completion of this return	Hannah Nickalls		
Telephone Number:	01634 840066		
E-mail:	hannah.nickalls@crossley.co.uk		

**Please follow the guidance notes in the completion of this return**

Any difficulties or problems in the completion of this return should be directed to the Certification

Officer as below or by telephone to: 0330 109 3602

You should send the annual return to the following email address stating the name of the union in subject:

For Unions based in England and Wales: [returns@certoffice.org](mailto:returns@certoffice.org)

For Unions based in Scotland: [ymw@tcyoung.co.uk](mailto:ymw@tcyoung.co.uk)

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# Return of Members

(see notes 10 and 11)

Number of members at the end of the year					
	Great Britain	Northern Ireland	Irish Republic	Elsewhere Abroad (including Channel Islands)	Totals
	1,123	34	33	221	1,411
<b>Total</b>	1,123	34	33	221	A 1,411

Number of members at end of year contributing to the General Fund

1,071

Number of members included in totals box 'A' above for whom no home or authorised address is held:

## Change of Officers

Please complete the following to record any changes of officers during the twelve months covered by this return

Position Held	Name of Officer ceasing to hold Office	Name of Officer Appointed	Date of change

State whether the union is:

a. A branch of another trade union?

Yes	<input type="checkbox"/>	No	<input checked="" type="checkbox"/>
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If yes, state the name of that other union:

b. A federation of trade unions?

Yes	<input type="checkbox"/>	No	<input checked="" type="checkbox"/>
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If yes, state the number of affiliated unions:

and names:





## Analysis of income from federation and other bodies and other income

(see notes 19 and 20)

Description	£
<b>Federation and other bodies</b>	
<b>Total federation and other bodies</b>	
<b>Any Other Sources</b>	
<b>Total other sources</b>	
<b>Total of all other income</b>	

# Analysis of benefit expenditure shown at the General Fund

(see notes 21 to 23)

			£
Representation – Employment Related Issues		<b>brought forward</b>	
		Advisory Services	
Representation – Non Employment Related Issues		Other Cash Payments	
		Education and Training services	
Communications			
		Negotiated Discount Services	
Dispute Benefits		Other Benefits and Grants (specify)	
<b>carried forward</b>		<b>Total (should agree with figure in General Fund)</b>	





(See notes 21 and 23)

Fund 4		Fund Account	
Name:		£	£
<b>Income</b>	From members		
	Investment income (as at page 12)		
	Other income (specify)		
	<b>Total other income as specified</b>		
	<b>Total Income</b>		
	Interfund Transfers IN		
<b>Expenditure</b>	Benefits to members		
	Administrative expenses and other expenditure (as at page 10)		
	<b>Total Expenditure</b>		
	Interfund Transfers OUT		
	<b>Surplus (Deficit) for the year</b>		
	<b>Amount of fund at beginning of year</b>		
	<b>Amount of fund at the end of year (as Balance Sheet)</b>		
	<b>Number of members contributing at end of year</b>		

Fund 5		Fund Account	
Name:		£	£
<b>Income</b>	From members		
	Investment income (as at page 12)		
	Other income (specify)		
	<b>Total other income as specified</b>		
	<b>Total Income</b>		
	Interfund Transfers IN		
<b>Expenditure</b>	Benefits to members		
	Administrative expenses and other expenditure (as at page 10)		
	<b>Total Expenditure</b>		
	Interfund Transfers OUT		
	<b>Surplus (Deficit) for the year</b>		
	<b>Amount of fund at beginning of year</b>		
	<b>Amount of fund at the end of year (as Balance Sheet)</b>		
	<b>Number of members contributing at end of year</b>		





## Political fund account

(see notes 24 to 33)

£

£

<b>Political fund account 1</b>		<b>To be completed by trade unions which maintain their own political fund</b>	
	<b>Income</b>		
	Members contributions and levies		
	Investment income (as at page 12)		
Other income (specify)			
		Total other income as specified	
		Total income	

<b>Expenditure under section (82) of the Trade Union and Labour Relations (Consolidation) Act 1992 on purposes set out in section (72) (1) where consolidation of expenditures from the political funds exceeds £2,000 during the period</b>	
<b>Expenditure A</b> (as at page i)	
<b>Expenditure B</b> (as at page ii)	
<b>Expenditure C</b> (as at page iii)	
<b>Expenditure D</b> (as at page iv)	
<b>Expenditure E</b> (as at page v)	
<b>Expenditure F</b> (as at page vi)	
<b>Non-political expenditure</b> (as at page vii)	
	Total expenditure
	Surplus (deficit) for year
	Amount of political fund at beginning of year
	Amount of political fund at the end of year (as <u>Balance Sheet</u> )
	Number of members at end of year contributing to the political fund
	Number of members at end of the year not contributing to the political fund
	Number of members at end of year who have completed an exemption notice and do not contribute to the political fund

<b>Political fund account 2</b>		<b>To be completed by trade unions which act as components of a central trade union</b>	
<b>Income</b>	Contributions and levies collected from members on behalf of central political fund		
	Funds received back from central political fund		
	Other income (specify)		
		Total other income as specified	
		Total income	
<b>Expenditure</b>	Expenditure under section 82 of the Trade Union and Labour Relations (Consolidation) Act 1992 (specify)		
	Administration expenses in connection with political objects(specify)		
	Non-political expenditure		
		Total expenditure	
		Surplus (deficit) for year	
		Amount held on behalf of trade union political fund at beginning of year	
		Amount remitted to central political	
		Amount held on behalf of central political fund at end of year	
		Number of members at end of year contributing to the political fund	
		Number of members at end of the year not contributing to the political fund	
		Number of members at end of year who have completed an exemption notice and do not therefore contribute to the political fund	















**Expenditure from the political fund not falling within section 72 (1) of the trade union & labour relations  
(consolidation) act 1992**

**For expenditure not falling within section 72 (1) the required information is-**

(a) the nature of each cause or campaign for which money was expended, and the total amount expended in relation to each one	£

Total expenditure

(b) the name of each organisation to which money was paid (otherwise than for a particular cause of campaign), and the total amount paid to each one	£

Total expenditure

(c) the total amount of all other money expended	£

Total expenditure

**Total of all expenditures**

# Analysis of administrative expenses and other outgoings excluding amounts charged to political fund accounts

(see notes 34 and 35)

	£
<b>Administrative Expenses</b>	
Remuneration and expenses of staff	26,950
Salaries and Wages included in above	[REDACTED]
Auditors' fees	947
Legal and Professional fees	9,582
Occupancy costs	
Stationery, printing, postage, telephone, etc.	
Expenses of Executive Committee (Head Office)	
Expenses of conferences	
Other administrative expenses (specify)	
Training Costs	10,000
Bank Charges	36
<b>Other Outgoings</b>	
[REDACTED]	
Outgoings on land and buildings (specify)	
[REDACTED]	
Other outgoings (specify)	
Depreciation	595
<b>Total</b>	<b>48,110</b>
Charged to:	General Fund (Page 3)
<b>Total</b>	







## Fixed assets account

(see notes 53 to 57)

	Land and Buildings		Furniture and Equipment £	Motor Vehicles £	Not used for union business £	Total £
	Freehold £	Leasehold £				
<b>Cost or Valuation</b>						
At start of year			1,699			1,699
Additions						
Disposals						
Revaluation/Transfers						
At end of year			1,699			1,699
<b>Accumulated Depreciation</b>						
At start of year			472			472
Charges for year			566			566
Disposals			28			28
Revaluation/Transfers						
At end of year			1,066			1,066
<b>Net book value at end of year</b>						
Net book value at end of year			633			633
<b>Net book value at end of previous year</b>						
Net book value at end of previous year						



## Analysis of investments

(see notes 58 and 59)

	All Funds Except Political Funds £	Political Fund £
<b>Quoted</b>		
Equities (e.g. Shares)		
Government Securities (Gilts)		
Other quoted securities (to be specified)		
Total quoted (as Balance Sheet)		
Market Value of Quoted Investment		
<b>Unquoted</b>		
Equities		
Government Securities (Gilts)		
Mortgages		
Bank and Building Societies		
Other unquoted investments (to be specified)		
Total unquoted (as Balance Sheet)		
Market Value of Unquoted Investments		



# Summary sheet

(see notes 62 to 73)

	All funds except Political Funds	Political Funds £	Total Funds £
<b>Income</b>			
From Members	119,417		119,417
From Investments			
Other Income (including increases by revaluation of assets)			
<b>Total Income</b>	119,417		119,417
<b>Expenditure</b> (including decreases by revaluation of assets)			
<b>Total Expenditure</b>	48,110		48,110
<b>Funds at beginning of year</b> (including reserves)	177,991		177,991
<b>Funds at end of year</b> (including reserves)	249,298		249,298
<b>Assets</b>			
Fixed Assets			633
Investment Assets			
Other Assets			248,665
		<b>Total Assets</b>	249,298
<b>Liabilities</b>		<b>Total Liabilities</b>	0
<b>Net Assets (Total Assets less Total Liabilities)</b>			249,298

# Summary sheet

(see notes 62 to 73)

	All funds except Political Funds £	Political Funds £	Total Funds £
<b>Income</b>			
From Members			
From Investments			
Other Income (including increases by revaluation of assets)			
<b>Total Income</b>			
<b>Expenditure</b> (including decreases by revaluation of assets)			
<b>Total Expenditure</b>			
<b>Funds at beginning of year</b> (including reserves)			
<b>Funds at end of year</b> (including reserves)			
<b>Assets</b>			
Fixed Assets			
Investment Assets			
Other Assets			
		<b>Total Assets</b>	
<b>Liabilities</b>		<b>Total Liabilities</b>	
<b>Net Assets (Total Assets less Total Liabilities)</b>			

(see notes 74 to 80)

<b>Did the union hold any ballots in respect of industrial action during the return period?</b>	<input type="text" value="No"/>
If Yes How many ballots were held: <input style="width: 50px;" type="text"/>	
For each ballot held please complete the information below:	
<b>Ballot 1</b>	
Number of individual who were entitled to vote in the ballot	<input style="width: 80px;" type="text"/>
<b>Number of votes cast in the ballot</b>	<input style="width: 80px;" type="text"/>
Number of Individuals answering "Yes" to the question	<input style="width: 80px;" type="text"/> <sup>1</sup>
Number of individuals answering "No" to the question	<input style="width: 80px;" type="text"/> <sup>2</sup>
Number of invalid or otherwise spoiled voting papers returned	<input style="width: 80px;" type="text"/> <sup>3</sup>
<b>1-3 should total "Number of votes cast"</b>	
Were the number of votes cast in the ballot at least 50% of the number of individuals who were entitled to vote in the ballot	<input style="width: 60px;" type="text"/>
Does section 226(2B) of the 1992 Act apply in relation to this ballot (see notes 76-80)?	<input style="width: 60px;" type="text"/>
If yes, were the number of individuals answering "Yes" to the question (or each question) at least 40% of the number of individuals who were entitled to vote in the ballot	<input style="width: 60px;" type="text"/>
<b>Ballot 2</b>	
Number of individual who were entitled to vote in the ballot	<input style="width: 80px;" type="text"/>
<b>Number of votes cast in the ballot</b>	<input style="width: 80px;" type="text"/>
Number of Individuals answering "Yes" to the question	<input style="width: 80px;" type="text"/> <sup>1</sup>
Number of individuals answering "No" to the question	<input style="width: 80px;" type="text"/> <sup>2</sup>
Number of invalid or otherwise spoiled voting papers returned	<input style="width: 80px;" type="text"/> <sup>3</sup>
<b>1-3 should total "Number of votes cast"</b>	
Were the number of votes cast in the ballot at least 50% of the number of individuals who were entitled to vote in the ballot	<input style="width: 60px;" type="text"/>
Does section 226(2B) of the 1992 Act apply in relation to this ballot (see notes 76-80)?	<input style="width: 60px;" type="text"/>
If yes, were the number of individuals answering "Yes" to the question (or each question) at least 40% of the number of individuals who were entitled to vote in the ballot	<input style="width: 60px;" type="text"/>
<b>Ballot 3</b>	
Number of individual who were entitled to vote in the ballot	<input style="width: 80px;" type="text"/>
<b>Number of votes cast in the ballot</b>	<input style="width: 80px;" type="text"/>
Number of Individuals answering "Yes" to the question	<input style="width: 80px;" type="text"/> <sup>1</sup>
Number of individuals answering "No" to the question	<input style="width: 80px;" type="text"/> <sup>2</sup>
Number of invalid or otherwise spoiled voting papers returned	<input style="width: 80px;" type="text"/> <sup>3</sup>
<b>1-3 should total "Number of votes cast"</b>	
Were the number of votes cast in the ballot at least 50% of the number of individuals who were entitled to vote in the ballot	<input style="width: 60px;" type="text"/>
Does section 226(2B) of the 1992 Act apply in relation to this ballot (see notes 76-80)?	<input style="width: 60px;" type="text"/>
If yes, were the number of individuals answering "Yes" to the question (or each question) at least 40% of the number of individuals who were entitled to vote in the ballot	<input style="width: 60px;" type="text"/>

**Ballot 4**

Number of individual who were entitled to vote in the ballot

**Number of votes cast in the ballot**

Number of Individuals answering "Yes" to the question  1

Number of individuals answering "No" to the question  2

Number of invalid or otherwise spoiled voting papers returned  3

**1-3 should total "Number of votes cast"**

Were the number of votes cast in the ballot at least 50% of the number of individuals who were entitled to vote in the ballot

Does section 226(2B) of the 1992 Act apply in relation to this ballot (see notes 76-80)?

If yes, were the number of individuals answering "Yes" to the question (or each question) at least 40% of the number of individuals who were entitled to vote in the ballot

**Ballot 5**

Number of individual who were entitled to vote in the ballot

**Number of votes cast in the ballot**

Number of Individuals answering "Yes" to the question  1

Number of individuals answering "No" to the question  2

Number of invalid or otherwise spoiled voting papers returned  3

**1-3 should total "Number of votes cast"**

Were the number of votes cast in the ballot at least 50% of the number of individuals who were entitled to vote in the ballot

Does section 226(2B) of the 1992 Act apply in relation to this ballot (see notes 76-80)?

If yes, were the number of individuals answering "Yes" to the question (or each question) at least 40% of the number of individuals who were entitled to vote in the ballot

**Ballot 6**

Number of individual who were entitled to vote in the ballot

**Number of votes cast in the ballot**

Number of Individuals answering "Yes" to the question  1

Number of individuals answering "No" to the question  2

Number of invalid or otherwise spoiled voting papers returned  3

**1-3 should total "Number of votes cast"**

Were the number of votes cast in the ballot at least 50% of the number of individuals who were entitled to vote in the ballot

Does section 226(2B) of the 1992 Act apply in relation to this ballot (see notes 76-80)?

If yes, were the number of individuals answering "Yes" to the question (or each question) at least 40% of the number of individuals who were entitled to vote in the ballot

**Ballots and Industrial Action: If you have 6 or more entries for either of these, please complete the Excel Spreadsheet**

(see note 81)

**\*Categories of Nature of Trade Dispute**

- A: terms and conditions of employment, or the physical conditions in which any workers require to work;
- B: engagement or non-engagement, or termination or suspension of employment or the duties of employment, of one or more workers;
- C: allocation of work or the duties of employment between workers or groups of workers;
- D: matters of discipline;
- E: a worker's membership or non-membership of a trade union;
- F: facilities for officials of trade unions;
  
- G: machinery for negotiation or consultation, and other procedures, relating to any of the above matters, including the recognition by employers or employers' associations of the right of a trade union to represent workers in such negotiation or consultation or in the carrying out of such procedures

**Did Union members take industrial action during the return period in response to any inducement on the part of the Union? YES/NO**

If **YES**, for each industrial action taken please complete the information below:

**Industrial Action 1**

1. please tick the nature of the trade dispute for which industrial action was taken using the categories\* below:

A  B  C  D  E  F  G

2. Dates of the industrial action taken:  to

3. Number of days of industrial action:

4. Nature of industrial action.

**Industrial Action 2**

1. please tick the nature of the trade dispute for which industrial action was taken using the categories\* below:

A  B  C  D  E  F  G

2. Dates of the industrial action taken:  to

3. Number of days of industrial action:

4. Nature of industrial action.

**Industrial Action 3**

1. please tick the nature of the trade dispute for which industrial action was taken using the categories\* below:

A  B  C  D  E  F  G

2. Dates of the industrial action taken:  to

3. Number of days of industrial action:

4. Nature of industrial action.

**use a continuation page if necessary**

**Industrial Action 4**

1. please tick the nature of the trade dispute for which industrial action was taken using the categories\* below:

A  B  C  D  E  F  G

2. Dates of the industrial action taken:  to

3. Number of days of industrial action:

4. Nature of industrial action.

**Industrial Action 5**

1. please tick the nature of the trade dispute for which industrial action was taken using the categories\* below:

A  B  C  D  E  F  G

2. Dates of the industrial action taken:  to

3. Number of days of industrial action:

4. Nature of industrial action.

**Industrial Action 6**

1. please tick the nature of the trade dispute for which industrial action was taken using the categories\* below:

A  B  C  D  E  F  G

2. Dates of the industrial action taken:  to

3. Number of days of industrial action:

4. Nature of industrial action.

**Industrial Action 7**

1. please tick the nature of the trade dispute for which industrial action was taken using the categories\* below:

A  B  C  D  E  F  G

2. Dates of the industrial action taken:  to

3. Number of days of industrial action:

4. Nature of industrial action.

**Industrial Action 8**

1. please tick the nature of the trade dispute for which industrial action was taken using the categories\* below:

A  B  C  D  E  F  G

2. Dates of the industrial action taken:  to

3. Number of days of industrial action:

4. Nature of industrial action.

**Ballots & Industrial Action- If you have 6 or more entries for either of these, please complete the Excel Spreadsheet**

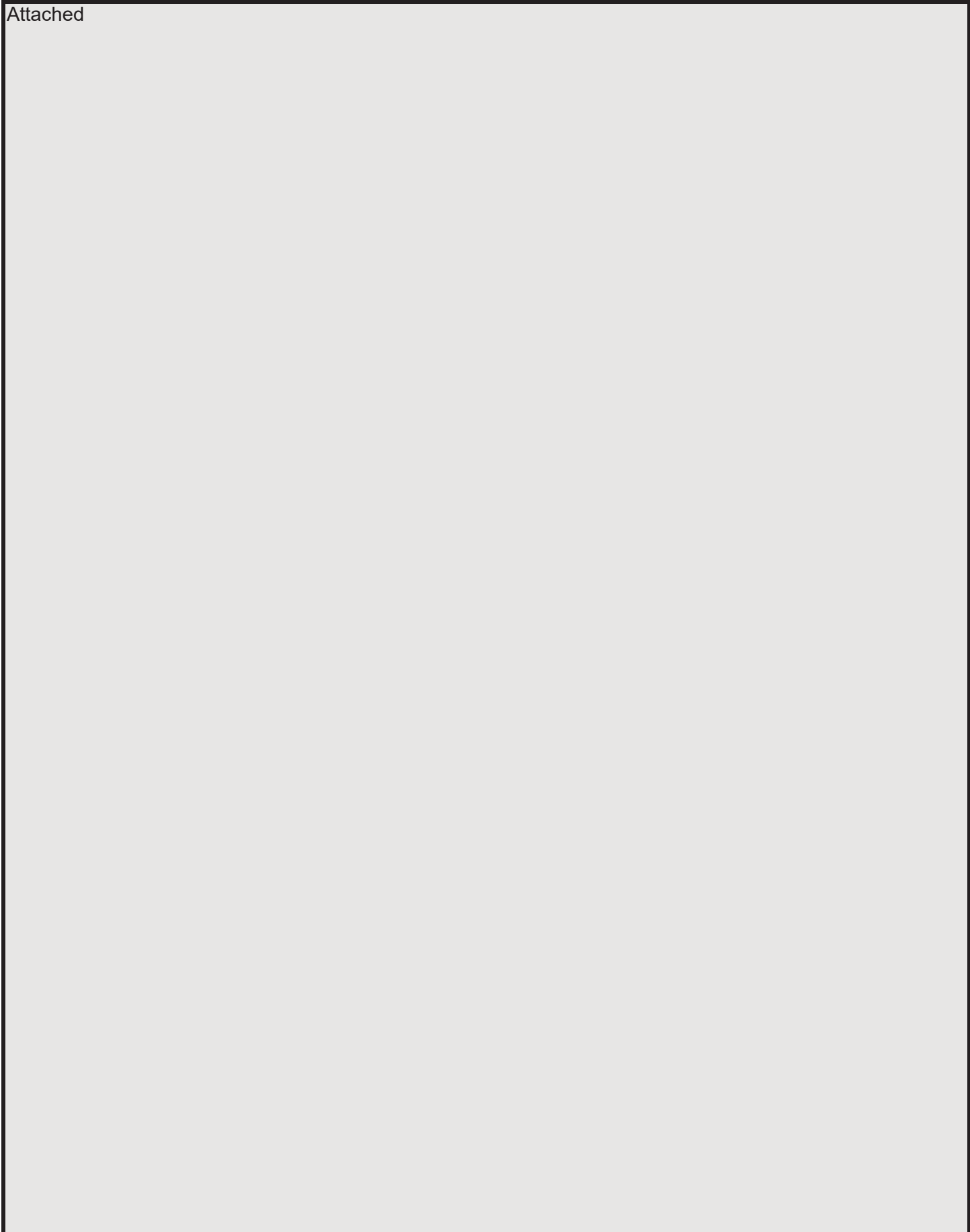


# Notes to the accounts

(see notes 82 and 83)

All notes to the accounts must be entered on or attached to this part of the return.

Attached




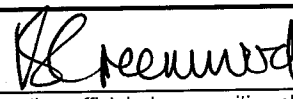
# Accounting policies

(see notes 84 and 85)

## Signatures to the annual return

(see notes 86 & 87)

Including the accounts and balance sheet contained in the return. Please copy and paste your electronic signature here

Secretary's Signature:		Chairman's Signature:	
			(or other official whose position should be stated)
Name:	Samantha Aitkenhead	Name:	VERONICA GREENWOOD
Date:	20/5/22	Date:	20/5/2022

## Checklist

(see notes 88 to 89)

(please tick as appropriate)

Has the return of change of officers been completed? (see Page 2 and Note 12)	Yes	✓	No	
Has the list of officers in post been completed? (see Page 2 and Note 12)	Yes	✓	No	
Has the return been signed? (see Pages 23 and 25 and Notes 86 and 95)	Yes	✓	No	
Has the auditor's report been completed? (see Pages 20 and 21 and Notes 2 and 77)	Yes	✓	No	
Is a rule book enclosed? (see Notes 8 and 88)	Yes	✓	No	
A member statement is: (see Note 80)	Enclosed	✓	To follow	
Has the summary sheet been completed? (see Page 17 and Notes 7 and 62)	Yes	✓	To follow	
Has the membership audit certificate been completed? (see Page i to iii and Notes 97 and 103)	Yes	✓	No	

# Checklist for auditor's report

(see notes 90 and 96)

The checklist below is for guidance. A report is still required either set out overleaf or by way of an attached auditor's report that covers the 1992 Act requirements.

1. In the opinion of the auditors or auditor do the accounts they have audited and which are contained in this return give a true and fair view of the matters to which they related? (See section 36(1) and (2) of the 1992 Act and notes 92 and 93)

Please explain in your report overleaf or attached.

Yes, member numbers are different by 4 overall as per the members report provided, 2 being ROI members as this difference is immaterial no adjustment has been made, however this has been reported to management

2. Are the auditors or auditor of the opinion that the union has complied with section 28 of the 1992 Act and has:

a. kept proper accounting records with respect to its transactions and its assets and liabilities; and

b. established and maintained a satisfactory system of control of its accounting records, its cash holding and all its receipts and remittances. (See section 36(4) of the 1992 Act set out in note 92)

Please explain in your report overleaf or attached

Yes, accounting records have been properly kept. There is good control of its accounting records (no cash held).

3. Your auditors or auditor must include in their report the following wording:

**In our opinion the financial statements:**

- give a true and fair view of the matters to which they relate to.
- have been prepared in accordance with the requirements of the sections 28, 32 and 36 of the Trade Union and Labour Relations (consolidation) Act 1992.

**Auditor's report (continued)**

See attached

Signature(s) of auditor or auditors:



Name(s):

Sally Meah

Profession(s) or Calling(s):

Senior Auditor

Address(es):

Star House, Star Hill, Rochester

Kent

Postcode

ME1 1UX

Date

12/05/22

Contact name for inquiries and telephone number:

Sally Meah - 01634 840440

N.B. When notes to the account are referred to in the auditor's report a copy of those notes must accompany this return.

## Membership audit certificate

made in accordance with section 24ZD of the Trade Union and Labour  
Relations (Consolidation) Act 1992

(See notes 97 to 103)

At the end of the reportign period proceding the one to which this audit relates was the total membership of the trade union greater than 10,000?

**No**

If "YES" please complete SECTION ONE below or provide the equivalent information on a separate document to be submitted with the completed AR21

If "NO" please complete SECTION TWO below or provide the equivalent information on a separate document to be submitted with the completed AR21

## Membership audit certificate

### Section one

*For a trade union with more than 10,000 members, required by section 24ZB of the 1992 Act to  
appoint an independent assurer*

- 1 In the opinion of the assurer appointed by the trade union was the union's system for compiling and maintaining its register of the names and addresses of its members satisfactory to secure, so far as is reasonably practicable, that the entries in its register were accurate and up-to-date throughout the reporting period?

**Yes** /  **No**

- 2 In the opinion of the assurer has he/she obtained the information and explanations necessary for the performance of his/her functions?

**Yes** /  **No**

If the answer to **either** questions 1 or 2 above is "NO" the assurer must:

- (a) set out below the assurer's reasons for stating that
- (b) provide a description of the information or explanation requested or required which has not been obtained
- (c) state whether the assurer required that information or those explanations from the union's officers, or officers of any of its branches or sections under section 24ZE of the 1992 Act
- (d) send a copy of this certificate to the Certification Officer as soon as is reasonably practicable after it is provided to the union.

## Membership audit certificate (continued)

Signature of assurer	
Name	Sally Meah
Address	Star House, Star Hill, Rochester Kent ME1 1UX
Date	12/05/22
Contact name and telephone number	Sally Meah - 01634 840440

# Membership audit certificate

## Section two


For a trade union with no **more than 10,000 members** at the end of the reporting period preceding the one to which this audit relates.

To the best of your knowledge and belief has the trade union during this reporting period complied with its duty to compile and maintain a register of the names and addresses of its members and secured, so far as is reasonably practicable, that the entries in the register are accurate and up-to-date?

Yes  No

If "No" Please explain below:

[Large greyed-out area for explanation]

Signature	
Name	Sally Meah
Office held	Senior Auditor
Date	12/05/22

Charity Registration No. 326905

Company Registration No. 01892427 (England and Wales)

**BRITISH & IRISH ORTHOPTIC SOCIETY**  
**ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 DECEMBER 2021**



# BRITISH & IRISH ORTHOPTIC SOCIETY

## LEGAL AND ADMINISTRATIVE INFORMATION

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<b>Charity number</b>	326905
<b>Company number</b>	01892427
<b>Registered office</b>	3rd Floor Interchange place 151 - 165 Edmund Street Birmingham B3 2TA
<b>Independent examiner</b>	Crossley Financial Accounting Star House Star Hill Rochester Kent ME1 1UX
<b>Bankers</b>	Unity Trust Bank Plc 9 Brindley Place Birmingham B1 2HB
<b>Solicitors</b>	Wrigleys Solicitors LLP 19 Cookridge Street Leeds LS2 3AG

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# BRITISH & IRISH ORTHOPTIC SOCIETY

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# BRITISH & IRISH ORTHOPTIC SOCIETY

## TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT)

### FOR THE YEAR ENDED 31 DECEMBER 2021

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The trustees present their report and financial statements for the year ended 31 December 2021.

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the charity's [governing document], the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)".

#### Chair and Vice Chair Report

Orthoptics as a profession has been highlighted by two extremely important awards in 2021. Just hours before 2021 ended we learned that Professor Helen Davis had been awarded an OBE for her Services to Orthoptics in the 2022 Queens New Years Honours List. This prestigious award recognises a life time of dedication to the profession and the education of Orthoptists. The Chief Allied Health Professional Officer for England awarded Rahilah Bukhari 'AHP of the Year 2021' for her work transforming paediatric pathways in emergency eye care.

We are pleased to report another healthy and robust financial position declared in the 2021 accounts and we continue to manage the budget and making continual improvements to the running of BIOS. The spend within the restricted funds have realised benefits for the registered and non-registered orthoptic workforce and clinical placement expansion and innovation for pre-registration orthoptists. Funding for early career researchers remains a focus and we were pleased to make a number of awards to pump prime clinical research projects. We are also delighted to launch the new Orthoptic Education Fund to provide financial assistance to members for educational activities and students facing hardship.

After the AGM in 2021 we honoured the following Orthoptists with BIOS awards for their dedication and service to BIOS in their voluntary roles:

- Trustees and Council

Sonia MacDiarmid — Chair of LOOP and Trustee

Jaina Byrne — Trustee for Republic of Ireland

Dr Jignasa Mehta – Public Health Lead

Professor Anna Horwood = Research and Innovation Director

Joe Smith – New graduate representative

- Clinical and Non Clinical Advisory Group Leads

Claire Studley Scott - lead for Global involvement and volunteering for Eyes (GIVE)

Dr Alison Bruce – Co-lead for Vision Screening

Helen Collett – Co Lead for Private patients Group

- Outstanding contribution to the profession

Carly Hegarty for her work in the SIHED project and work experience for prospective orthoptists.

Clinical placement expansion is a high priority for BIOS and the profession has delivered the work supported by the HEE funding and is moving into a phase to increase the resources through innovation and technology to support simulation placements and remote live streaming of patients. This initial project was achieved by the outstanding work by 2 Lead Clinical Tutors, Lizi Lomas and Alice Donachie, and the IT Project Manager, Shell Murray.

# BRITISH & IRISH ORTHOPTIC SOCIETY

## TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2021

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Looking forward into 2022 we welcome the award of HEE Workforce Reform funding to deliver objectives and projects including Advanced Practice, Support Workforce development, Apprenticeships, retention and support in early careers and placement recovery and expansion.

The Trustees, Council, standing committee members, clinical advisory group leads and other volunteers have continued to represent BIOS throughout 2021 in addition to supporting their own colleagues in their full time clinical, academic or research roles and we would like to thank them all for their continued support during this year.

*Veronica Greenwood – Chair BIOS*

*Julie Dowdney – Vice Chair BIOS*

BIOS are now half way through our four-year strategy beginning in 2020, and continue to build on our vision for the future of the profession, focused on our four key themes: informing the public, ensuring the future of the profession, promoting high quality practice, leading the profession, and supporting our members.

We continue to work within the context of the COVID—19 pandemic, and many of our achievements over the past year have been supporting our members through the pandemic, but also in taking advantage of this situation to update and adapt our services. Our vision for the future of orthoptics remains for it to be a thriving and sustainable profession, and we see a key role for orthoptists in the recovery and rebuilding of services following the pandemic.

In the Trustees' report we highlight our achievements in 2021 against the priorities from our strategic plan.

# BRITISH & IRISH ORTHOPTIC SOCIETY

## TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2021

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#### **Supporting our members**

BIOS has continued to support and represent orthoptic professionals working across the UK and Ireland, looking to adapt the services we provide and provide new ways for members to engage and feedback.

We have continued our focus from last year or looking to engage our members to provide feedback and suggestions for how they would like the Society to evolve. We held nine virtual listening events last year, which proved invaluable in shaping our services and fed into much of the work below. We also conducted a member survey towards the end of the year, the results of which have been shared with the members. The feedback was overwhelmingly positive and provided a number of areas where we have already started to further develop our services.

We held our second virtual AGM in June, which was another huge success, attended by 178 members, although we look forward to reporting back our achievements in person this year.

#### **Membership**

This year saw the introduction of new categories of membership to better reflect the needs of our members and continue to represent value for money for members in the Republic of Ireland and non-practising members. We've continued this work this year and were able to sign off on a new system for joining, whereby new members can start their annual membership at the beginning of any month. This will support recruitment, as it can now continue throughout the year, and allow former members who have allowed their membership to lapse to re-join without paying a large back payment.

#### **Advice and support**

All of our full members receive bespoke Medical & Professional Liability Insurance. The insurance offered through BIOS is also the only insurance that covers the entire scope and extended scope of practice by an orthoptist. We know how valuable this is to our members and we were delighted to be able to continue to offer this to members in the Republic of Ireland following the renewal of our insurance in the summer.

Members in the UK also receive support from the BOS TU, providing representation and advice on work matters from local BOS TU reps and Society Officers and experts including grievance and disciplinary issues, and terms and conditions of employment. 2020 saw the transition of the Union to a separate structure, under an elected General Secretary and Executive Board. This is an exciting development, allowing for the better representation of our members' interests in pay and employment matters.

To ensure new and existing members are getting the most of the services and support we offer, we created a guide for new members, highlighting some of our most valued member benefits and how to access them.

We're also looking to support members who are looking to get more involved in promoting the profession. With this in mind we have created a new influencing section on the website, which we will look to further expand in the coming year. It includes links to all of our exiting promotional resources and guides, as well as a growing number of new resources. This includes a new Beginner's Guide to Social Media, which highlights the ways in which we use various social media platforms but also gives hints and guidance on starting out in using social media to stand up for orthoptics.

We continued to update our COVID information hub, but with an increasing focus on the recovery and restoration of services, updating and expanding our guidance document in July. These continued to be well accessed, with over 10,000 views in 2021.

#### **Leads and Heads of Service**

Led by the LOOP steering committee, we produced a number of resources to support members in the planning of orthoptic services. March saw the launch of our Job Planning for Orthoptists guide, including a downloadable tool to calculate the hours of each activity. This has already received over 2,000 views. Last year also saw the addition of a number of template job descriptions, covering bands 5 to 8c.

# BRITISH & IRISH ORTHOPTIC SOCIETY

## TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2021

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#### Leads and Heads of Service

Led by the LOOP steering committee, we produced a number of resources to support members in the planning of orthoptic services. March saw the launch of our Job Planning for Orthoptists guide, including a downloadable tool to calculate the hours of each activity. This has already received over 2,000 views. Last year also saw the addition of a number of template job descriptions, covering bands 5 to 8c.

#### CPD and Networking

Our Clinical and non-Clinical Advisory Groups (CAGs and nCAGs) along with the Trustees and their local organisers have adapted during the pandemic, taking advantage of virtual platforms to continue to support members through high quality CPD.

BIOS now have access to a number of online meeting and webinar platforms to provide a number of events throughout 2021. Some of the highlights were:

- Two LOOP events, one in March which saw the launch of the BIOS Job Planning Guide, and one in November focused on developments in advanced practice.
- A wide range of specialist webinars organised by our CAGs, including Stroke and Neuro Rehab, Glaucoma, Retinal Disease, SEN and VPD.
- The Student Clinical Placement Forum in October, to provide updates and support for clinical tutors
- A clinical meeting for members in Scotland and two regional meetings in England

Last year also saw our first ever virtual conference, held over two days in June. This was attended by over 160 members, who saw presentations on a range of topics, including Glaucoma, IVT, remote assessment of vision, paediatric acuity tools and Myopia management. While we look forward to a getting to meet in person, it was fantastic to be able to once again host an incredible array of lively discussions on orthoptics.

We've also been able to take advantage of these virtual platforms to make recordings of all of our events, which we have added to the members' area of the website. Our videos received over 2,800 views in 2021, and can now be accessed as educational resources permanently.

The website continued to provide a focus for extending and supporting the work done by all our specialist groups, and enabled the sharing of information of resources. Our members' area received almost 100,000 page views last year.

#### Orthoptic Education Fund (OEF)

BIOS acquired what was the Orthoptic Benevolent Fund, and have relaunched this vital support fund for orthoptists as the OEF. Already, by the end of 2021, we had awarded over £3,500 in grants to support orthoptic students facing hardship and practising orthoptists looking to fund CPD. We will be looking to build on this in the coming year, through greater promotion and careful management of the fund to enable us to provide greater support in the years to come.

#### Promoting high-quality practice

One of our core roles is in advancing standards in clinical and scientific orthoptics, through the setting of standards and the promotion of good practice.

#### Setting standards

Our CAGs have continued to produce up to date standards and competencies for our members. They also continued to work with other organisations in their fields to produce collaborative guidelines and documentation.

- The Retinal Disease produced professional practice guidelines for Intravitreal injections of Anti-VEGF or Intravitreal Steroid Implants

# BRITISH & IRISH ORTHOPTIC SOCIETY

## TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2021

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- The Neuro-Orthoptics CAG updated their webpage with a greatly expanded section on links and resources for members
- The SEN CAG worked with NHS England to ensure specific information was produced for orthoptists on the Special School Eye Care Service
- The Stroke and Neuro Rehab Group updated their position statement on vision services in stroke practice, and launched a further leaflet for patients on Driving and visual defects
- The Vision Screening CAG produced an updated Training Manual for vision screeners in schools
- The Low Vision CAG produced core skills and competencies guidance for clinical practice by orthoptists

Last year also saw the launch of the clinical advisory group for Paediatric Ophthalmology, led by Connor Beddow, Kimberley Hall and Ashli Milling. They have a member page, with a number of resources, and held their first event online this January.

#### **Education**

There are also now two new Advanced clinical practice courses one in paediatrics at the University of Sheffield and one in neuro-ophthalmology at the University of Liverpool. This will be vital in ensuring that orthoptists are able to continue to support the expansion of eye care services. BIOS have also provided funding for 16 places across the two courses.

The BIOS Preceptorship Document was updated in 2021 and now included guidance for heads of service and professional leads to enable them to provide greater support to new graduates. This will be especially important for those whose studies have been affected by limitations on clinical placements during the COVID pandemic.

#### **Public Health**

We appointed a new Public Health Lead, Fiona Bush, in 2021 to enable us to continue to promote the role of Orthoptists in prevention and early intervention. The impact of this is highlighted in a number of case studies on the website of the Royal Society of Public Health website demonstrating work of orthoptists promoting public health their work.

We've also started a new piece of work looking to promote the NHS Net Zero campaign, providing information and resources to support orthoptists to reduce the carbon footprint of their services. We're currently collating case studies to highlight ways in which orthoptists are already achieving this and to promote further action.

Following the disruption, the pandemic has caused to vision screening services in schools, there is still a great deal to do to aid the recovery of these services. We have been working closely with colleagues in AOP, ABDO, LOCSU and RCOphth to collaboratively develop a post Vision Screening Pathway, with the aim that it is used as a commissioning tool.

#### **Research**

We continue to promote and support Orthoptists involved in research, to support their career development but also to advance British orthoptics nationally and internationally. We appointed a new Research Director, Kerry Hanna and she has set up a steering committee to better support this area of work.

We have continued to provide financial support for researchers, ring-fencing £20,000 over the past two years. Last year, we provided six awards to support new orthoptic researchers, to pump prime research across the profession. We also announced our joint funding with Fight For Sight to support research exploring measures to tackle the barriers to treatment of amblyopia for children in social deprivation.

#### **British and Irish Orthoptics Journal (BIOJ)**

BIOJ continues to extend its reach, with a 68% increase in users and over 41,000 page views last year. The Journal continued to publish original research, review articles, case reports and scientific letters across a range of areas and topics, attracting readers from a wide range of sources. There was a significant rise in the number of publications with 21 articles published, compared to 8 in 2020.

# BRITISH & IRISH ORTHOPTIC SOCIETY

## TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2021

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### Informing the public

We have continued to work hard throughout 2021 to promote awareness of orthoptics and the valuable work done by Orthoptists, as well as to make ourselves a hub for accessible information about eye care and orthoptic services.

### Growing general awareness

We have continued to have a strong social media presence, thanks largely due to the work of our members in sharing, liking and retweeting.

- On Twitter, we made over 361,000 impressions, and now nearing 2,000 followers.
- Our Facebook page had 980 followers by the end of 2021, and our posts had over 122,000 impressions.

We have also launched a new LinkedIn account to give us another platform to share information and updates with our members and other stakeholders. We are already building a presence and have steadily increasing numbers.

One key focus of our social media activity was around the events of World Orthoptic Day, which was again largely virtual. Alongside our colleagues from around the world, we were able to promote the profession across all our platforms, making 22,500 Twitter impressions on the day alone. Events in Northern Ireland were focused on the newly launched Twitter account, which was able to put out a supportive message from the Minister of Health.

The reach of our website has continued to grow well beyond our membership, providing a hub for information on orthoptics in the UK and Ireland. We had a massive 780,000 page views in 2021, an increase of 52% on the previous year, with 5,300 visitors each month. Our visibility on search engines has continued to increase with 43,000 clicks through from Google and 1,368,000 impressions. This has led to a significant increase in visits to our public information pages of 84%, with over 113,000 page views.

### Ensuring the future of the profession

The hugely successful SIHED project, funded by the Office for Students, came to an end in 2020 but we have looked to build on this success by continuing to fund a secondment to support work placements and careers.

Before SIHED came to an end, they produced a series of online CPD training courses focusing on outreach work with young people and career changers, available for free on the HEE E-Learning for Healthcare platform. These will support AHPs, such as orthoptists who wish to engage with schools and young people to promote careers in healthcare.

### Placement Expansion Resource Library (PERL)

The COVID-19 pandemic has created particular challenges for the continued provision of clinical placements for orthoptic students, with many services scaled back or stopped and access to healthcare settings restricted. BIOS were awarded £90,000 from Health Education England to restart and expand clinical placements and we have made use of this to create PERL, an online library of resources to support orthoptics students to gain confidence and expertise in clinical decision making despite clinical placement limitations. This is available to all students and full members of BIOS and has had over 14,000 page views already. We expect this to be a hugely valuable resource for years to come.

### New Pre-registration course at UCL

September saw the launch of the UK's first ever pre-registration Orthoptics MSc at UCL Institute of Ophthalmology, providing an accelerated route into orthoptics for science graduates. This is a huge step forward in protecting the future of the profession, as it will support increased recruitment into the profession, particularly from the South of England, a shortage region, and from mature students.



# BRITISH & IRISH ORTHOPTIC SOCIETY

## TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2021

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#### Leading the profession

BIOS also plays a significant role representing the profession in a number of formal and informal bodies and groupings. For example, we are represented on the AHPF Board and policy groupings, the Royal College of Ophthalmologists' paediatric subcommittee, the Eye Health Forum, the UK Ophthalmology Alliance, along with a seat on the Clinical Council for Eye Health Commissioning (CCEHC).

BIOS remain affiliated to both the Orthoptistes de la Communauté Européenne (OCE), representing Orthoptists in Europe, and the International Orthoptic Association (IOA), giving us representation in important international discussions affecting our members.

BIOS represents Orthoptists across all four countries of the United Kingdom and in the Republic of Ireland. Many of the issues facing our members will be common across the UK and Ireland. However, through all our work we look to provide representation and support that recognises the differences in the contexts within which our members are working. As such, the role of our regional and country trustees is essential.

In 2021 we responded to a number of consultations on behalf of our members, including:

- Health Education England - Long-Term Strategic Framework for Health and Social Care Workforce Planning. We focused on the likely demand for ophthalmology services with the increase in the older population, and the potential for orthoptists to take a big role in addressing this.
- DHSC – Regulating healthcare professionals, protecting the public. We supported the suggested changes making the overall powers of regulators more consistent but also giving them more flexibility to adapt to their sector, while raising concerns, largely relating to accountability, such as the need for oversight of fees being increased.
- Department of Health, Northern Ireland - Future Planning Model: Integrated Care System Draft Framework. We have supported the general direction but raised concerns over the lack of commitment to AHP representation at different levels and the need for professional expertise at local board level.
- Health and Care Professions Council (HCPC) – Consultation on the revised Guidance on Health and Character. We were in favour of the changes, as they provide greater clarity and consistency for our members around making self-referrals and expectations during this process.
- DVLA – Amending the Road Traffic Act 1988 to allow registered healthcare professionals to complete DVLA medical questionnaires. We have strongly supported the extension of the right to complete medical questionnaires, and have in particular raised through this and directly with the DVLA the need for orthoptists to be included in this.

#### Financial review

The Society reports a net surplus of £326,022 for the year (2020 – net surplus of £123,128). Free reserves at 31 December 2021 were £171,999 (2020 - £132,665). Restricted funds at 31 December 2021 amounted to £427,875 (2020 - £141,186).

#### Going concern

After making appropriate enquiries, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. For this reason they continue to adopt the going concern basis in preparing the financial statements. Further details regarding the adoption of the going concern basis can be found in the Accounting Policies.

#### Reserves policy

The Trustees have considered the level of activity within the charity and believe a level of free reserves of £273,852 is sufficient to support the ongoing operation of the society in the foreseeable future. At 31 December 2021, the Society has free reserves of £173,532. The Trustees are aware that this is below the stated target and are focused on replenishing these reserves over the coming years.

# BRITISH & IRISH ORTHOPTIC SOCIETY

## TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

*FOR THE YEAR ENDED 31 DECEMBER 2021*

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### **Structure, governance and management**

#### **Constitution**

The company is registered as a charitable company limited by guarantee and was set up by a Memorandum of Association on 14 March 1998.

The company is constituted under a Memorandum of Association dated 14 March 1998 and is a registered charity number 326905.

In 2014 the British & Irish Orthoptic Society (BIOS) reviewed its structure and a new organisational form was complete for the start of 2015 in order to provide a sustainable organisation to ensure a stable future for BIOS to promote its charitable aims. This became embedded in 2016 and an amendment to the articles was agreed at the AGM in 2017 for the Chair of LOOP to become a Trustee of the Board.

#### **Method of appointment or election of Trustees**

Trustees are recruited to represent members in England (3 regions), Scotland, Wales, Republic of Ireland and Northern Ireland. Nominations are requested from all members and application is in writing with reference to a job description and job specification. Where there is more than one candidate, applications are circulated anonymously to voting trustees.

The vast majority of officers of the Society are volunteers and undertake BIOS work in addition to their day jobs. Only the Chair, and Vice Chair are seconded and their employers are reimbursed for their time commitment to BIOS and British Orthoptic Society Trade Union (BOSTU) roles.

BIOS Council and Committee Officers/members - These appointments and roles were applicable in all or part of 2021:

# BRITISH & IRISH ORTHOPTIC SOCIETY

## TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2021

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### **BIOS Honorary Officers and trustees**

Veronica Greenwood, Chair  
Julie Cartledge - Vice Chair

### **BIOS Trustees**

Midlands & East – Haseeb Ali (Jan-July 2021); Vacant (Aug-Dec 2021)  
Northern - Deborah Podmore  
Southern - Kelly MacKenzie  
Northern Ireland - Declan McClements  
Republic of Ireland - Jaina Byrne  
Wales - Vacant (Jan-June 2021); Patrick Reedy (Jun-Dec 2021)  
Scotland - Angela Carlin  
Leads of Orthoptic Profession Chair: Sonia MacDiarmid (Jan-Jun 2021); Krishan Parmar (Jun-Dec 2021)

### **BOS TU Trustees (Jan-Jun 2021)**

As above BIOS honorary officers and trustees previously stated, omitting the Republic of Ireland  
BOSTU advisor non-voting: Sam Aitkenhead

### **BOS TU Executive Board (Jun-Dec 2021)**

General Secretary: Sam Aitkenhead  
President: Vacant  
Wales: Vacant  
Northern Ireland: Vacant  
Scotland: Vacant  
England: Joe Smith, John McBride and Vacant

### **BIOS Council members (non-voting)**

Journal: Jill Carlton Editor of Journal,  
IOA Representative: David Newsham  
OCE Representative: Anne Bjerre  
Research Director: Anna Horwood (Jan-Jun 2021); Kerry Hanna (Jun-Dec 2021)  
Education and Professional Development Committee Chair: Helen Davis  
New Graduate Representative: Joe Smith (Jan-Jun 2021); Holly Kniazewycz (Jun-Dec 2021)  
Public Health Lead: Jigs Mehta (Jan-Jun 2021); Fiona Bush (Jun-Dec 2021);  
BOSTU advisor (General Secretary from Jun 2021): Sam Aitkenhead

### **Clinical Advisory Group Leads**

Falls - Jigs Mehta  
Retinal Disease - Declan McClements and Lorraine Manklow  
Glaucoma – Katie Meakings  
Neuro Orthoptics/neuro Ophthalmology - Joanne Adeoye and Victoria Smerdon  
Visual Processing Difficulties - Priti Kashyap & Sajida Hanif  
Special Educational Needs - Louise Allen  
Stroke and Neuro Rehabilitation – Alex Green and Lauren Hepworth  
Vision Screening - Miriam Conway & Asad Atiq  
Low Vision - Martin Rhodes and Charlotte Codina

### **Non-Clinical Advisory Group Leads**

Global Involvement and volunteering for eyes (GIVE) - Rowena McNamara  
e-Health- Michelle Wood and Carla Eccleston  
Private Practice - Liz Tomlin and Jamie Spofforth  
Medicines - Lorraine North & Karzan Hughes

# BRITISH & IRISH ORTHOPTIC SOCIETY

## TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2021

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### Policies adopted for the induction and training of Trustees

New trustees receive induction from the chair and vice chair and a copy of the Governance and Procedures Handbook, which become effective from the start of the 2019 membership year.

### Organisational structure and decision making

The honorary officers and BOSTU Advisor are in regular communications via email, telephone, Skype and face-to-face when required to transact decision making work. Business is conducted via the business provider company who meet with the honorary officers regularly. Trustee meetings are held 4 times per year and full council twice per year with an AGM in June to appoint new officers and agree the accounts.

### Related party relationships

The Society collects membership fees on behalf of the BOSTU. The society is a member of professional organisations within the eye health and care sector.

### Statement of trustee's responsibilities

The trustees, who are also the directors of British & Irish Orthoptic Society for the purpose of company law, are responsible for preparing the Trustee's Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

Company Law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material 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 adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustee's report was approved by the Board of Trustees.



V Greenwood, Chair

Trustee

Dated: 4/5/2022

# BRITISH & IRISH ORTHOPTIC SOCIETY

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF BRITISH & IRISH ORTHOPTIC SOCIETY

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I report to the trustees on my examination of the financial statements of British & Irish Orthoptic Society (the charity) for the year ended 31 December 2021.

#### **Responsibilities and basis of report**

As the trustees of the charity (and also its directors for the purposes of company law) you are responsible for the preparation of the financial statements in accordance with the requirements of the Companies Act 2006 (the 2006 Act).

Having satisfied myself that the financial statements of the charity are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of the charity's financial statements carried out under section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

#### **Independent examiner's statement**

Since the charity's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of , which is one of the listed bodies.

I have completed my examination. I confirm that no matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

- 1 accounting records were not kept in respect of the charity as required by section 386 of the 2006 Act; or
- 2 the financial statements do not accord with those records; or
- 3 the financial statements do not comply with the accounting requirements of section 396 of the 2006 Act other than any requirement that the accounts give a true and fair view which is not a matter considered as part of an independent examination; or
- 4 the financial statements have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

In our opinion the financial statements have been prepared in accordance with the requirements of the Trade Union and Labour Relations (Consolidation) Act 1992.

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

Sally Meah BA Hons FCCA

Star House  
Star Hill  
Rochester  
Kent  
ME1 1UX

Dated: .....

# BRITISH & IRISH ORTHOPTIC SOCIETY

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT

FOR THE YEAR ENDED 31 DECEMBER 2021

		Unrestricted funds 2021 £	Restricted funds 2021 £	Total 2021 £	Unrestricted funds 2020 £	Restricted funds 2020 £	Total 2020 £
<b><u>Income and endowments from:</u></b>							
Donations and legacies	2	-	384,345	384,345	-	108,746	108,746
Charitable activities	3	301,447	-	301,447	280,331	-	280,331
Investments	4	30,901	-	30,901	579	-	579
Other income	5	1,101	-	1,101	256	-	256
<b>Total income</b>		<b>333,449</b>	<b>384,345</b>	<b>717,794</b>	<b>281,166</b>	<b>108,746</b>	<b>389,912</b>
<b><u>Expenditure on:</u></b>							
Charitable activities	6	292,582	99,190	391,772	244,857	21,927	266,784
<b>Net income for the year/ Net movement in funds</b>		<b>40,867</b>	<b>285,155</b>	<b>326,022</b>	<b>36,309</b>	<b>86,819</b>	<b>123,128</b>
Fund balances at 1 January 2021		132,665	141,187	273,852	96,356	54,367	150,723
<b>Fund balances at 31 December 2021</b>		<b>173,532</b>	<b>426,342</b>	<b>599,874</b>	<b>132,665</b>	<b>141,186</b>	<b>273,851</b>

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006.

# BRITISH & IRISH ORTHOPTIC SOCIETY

## STATEMENT OF FINANCIAL POSITION

AS AT 31 DECEMBER 2021

	Notes	2021 £	£	2020 £	£
<b>Fixed assets</b>					
Tangible assets	9		30,071		30,534
Investments	10		251,373		-
			<u>281,444</u>		<u>30,534</u>
<b>Current assets</b>					
Debtors	11	31,599		80,184	
Cash at bank and in hand		684,612		409,318	
		<u>716,211</u>		<u>489,502</u>	
<b>Creditors: amounts falling due within one year</b>	12	(397,781)		(246,185)	
Net current assets			318,430		243,317
<b>Total assets less current liabilities</b>			<u>599,874</u>		<u>273,851</u>
<b>Income funds</b>					
Restricted funds	13		426,342		141,186
Unrestricted funds			173,532		132,665
			<u>599,874</u>		<u>273,851</u>

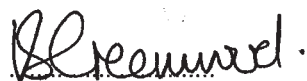
The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 December 2021.

The directors acknowledge their responsibilities for ensuring that the charity keeps accounting records which comply with section 386 of the Act and for preparing financial statements which give a true and fair view of the state of affairs of the company as at the end of the financial year and of its incoming resources and application of resources, including its income and expenditure, for the financial year in accordance with the requirements of sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the company.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 4/5/2022



V Greenwood, Chair  
Trustee

Company Registration No. 01892427

# BRITISH & IRISH ORTHOPTIC SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2021

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### 1 Accounting policies

#### Charity information

British & Irish Orthoptic Society is a private company limited by guarantee incorporated in England and Wales. The registered office is 3rd Floor, Interchange place, 151 - 165 Edmund Street, Birmingham, B3 2TA.

#### 1.1 Accounting convention

The financial statements have been prepared in accordance with the charity's [governing document], the Companies Act 2006 and "Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2019)". The charity is a Public Benefit Entity as defined by FRS 102.

The charity has taken advantage of the provisions in the SORP for charities applying FRS 102 Update Bulletin 1 not to prepare a Statement of Cash Flows.

The financial statements are prepared in sterling, which is the functional currency of the charity. Monetary amounts in these financial statements are rounded to the nearest £.

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

#### 1.2 Going concern

At the time of approving the financial statements, the trustees have a reasonable expectation that the charity has adequate resources to continue in operational existence for the foreseeable future. Thus the trustees continue to adopt the going concern basis of accounting in preparing the financial statements.

#### 1.3 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives.

Restricted funds are subject to specific conditions by donors as to how they may be used. The purposes and uses of the restricted funds are set out in the notes to the financial statements.

Endowment funds are subject to specific conditions by donors that the capital must be maintained by the charity.

#### 1.4 Incoming resources

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, the amounts can be measured reliably, and it is probable that income will be received.

Cash donations are recognised on receipt. Other donations are recognised once the charity has been notified of the donation, unless performance conditions require deferral of the amount. Income tax recoverable in relation to donations received under Gift Aid or deeds of covenant is recognised at the time of the donation.

Legacies are recognised on receipt or otherwise if the charity has been notified of an impending distribution, the amount is known, and receipt is expected. If the amount is not known, the legacy is treated as a contingent asset.



# BRITISH & IRISH ORTHOPTIC SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2021

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#### 1 Accounting policies

(Continued)

##### 1.5 Resources expended

Expenditure is recognised once there is a legal or constructive obligation to transfer economic benefit to a third party, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably.

All expenditure is accounted for on an accruals basis. All expenses including support costs and governance costs are allocated to the applicable expenditure headings. The cost of raising funds comprise investment management costs.

Support costs are those costs incurred directly in support of expenditure on the objects of the charity. Governance costs are those incurred in connection with administration of the charity and compliance with constitutional and statutory requirements.

##### 1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Website	20% straight line
Office Equipment	3 years straight line

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in net income/(expenditure) for the year.

##### 1.7 Fixed asset investments

Fixed asset investments are initially measured at transaction price excluding transaction costs, and are subsequently measured at fair value at each reporting date. Changes in fair value are recognised in net income/(expenditure) for the year. Transaction costs are expensed as incurred.

##### 1.8 Financial instruments

The charity has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the charity's balance sheet when the charity becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.

##### **Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

# BRITISH & IRISH ORTHOPTIC SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2021

### 1 Accounting policies

(Continued)

#### **Basic financial liabilities**

Basic financial liabilities, including creditors and bank loans are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of operations from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

#### **Derecognition of financial liabilities**

Financial liabilities are derecognised when the charity's contractual obligations expire or are discharged or cancelled.

### 2 Donations and legacies

	<b>Restricted funds</b>	Total
	<b>2021</b>	2020
	£	£
Grants	384,345	108,746
	<u>          </u>	<u>          </u>

### 3 Charitable activities

	<b>Unrestricted funds</b>	Unrestricted funds
	<b>2021</b>	2020
	£	£
Member's subscriptions	293,322	280,116
Course income	8,125	215
	<u>          </u>	<u>          </u>
	<u>301,447</u>	<u>280,331</u>

# BRITISH & IRISH ORTHOPTIC SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2021

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### 4 Investments

	<b>Unrestricted funds</b>	Unrestricted funds
	<b>2021</b>	2020
	<b>£</b>	£
Interest receivable	30,901	579
	<u>          </u>	<u>          </u>

### 5 Other income

	<b>Unrestricted funds</b>	Unrestricted funds
	<b>2021</b>	2020
	<b>£</b>	£
Advertising income	1,045	200
Sundry income	56	56
	<u>          </u>	<u>          </u>
	<u>1,101</u>	<u>256</u>

# BRITISH & IRISH ORTHOPTIC SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2021

#### 6 Charitable activities

	<b>Activities 2021 £</b>	<b>Activities 2020 £</b>
Secondment costs	136,435	75,216
Courses and conferences	4,889	1,090
Journal	14,389	6,619
Contribution to awards	10,210	9,750
Innovation awards	463	235
	<u>166,386</u>	<u>92,910</u>
Share of support costs (see note 7)	184,811	135,701
Share of governance costs (see note 7)	40,575	38,173
	<u>391,772</u>	<u>266,784</u>
<b>Analysis by fund</b>		
Unrestricted funds	292,582	244,857
Restricted funds	99,190	21,927
	<u>391,772</u>	<u>266,784</u>
<b>For the year ended 31 December 2020</b>		
Unrestricted funds	244,857	
Restricted funds	21,927	
	<u>266,784</u>	

# BRITISH & IRISH ORTHOPTIC SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2021

### 7 Support costs

	Support costs	Governance costs	2021	Support costs	Governance costs	2020
	£	£	£	£	£	£
Depreciation	10,404	-	10,404	8,475	-	8,475
Office cost	1,714	-	1,714	1,921	-	1,921
Insurance	37,562	-	37,562	32,374	-	32,374
Telephone and postage	216	-	216	38	-	38
Bank charges	5,343	-	5,343	4,952	-	4,952
Business management costs	83,591	-	83,591	65,127	-	65,127
Computer costs	11,283	-	11,283	11,108	-	11,108
Legal, professional and consultancy fees	23,801	-	23,801	17,188	-	17,188
Training costs	5,397	-	5,397	-	-	-
Advertising and marketing	5,500	-	5,500	-	-	-
Accountancy	-	36,524	36,524	-	27,490	27,490
AGM, Committee and officer's expenses	-	4,051	4,051	-	5,201	5,201
	<u>184,811</u>	<u>40,575</u>	<u>225,386</u>	<u>141,183</u>	<u>32,691</u>	<u>173,874</u>
Analysed between						
Charitable activities	<u>184,811</u>	<u>40,575</u>	<u>225,386</u>	<u>135,701</u>	<u>38,173</u>	<u>173,874</u>

Governance costs includes payments to the independent examiner's as follows:

Independent examiner's remuneration - £1,596 (2020 - £1,548)

Independent examiner's remuneration - accountancy - £1,902 (2020 - £1,848)

### 8 Trustees

None of the trustees (or any persons connected with them) received any remuneration or benefits from the charity during the year.

During the year, 1 Trustee received £253 for reimbursement of expenses (2020 - £269 to 9 Trustees).

# BRITISH & IRISH ORTHOPTIC SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2021

### 9 Tangible fixed assets

	Website £	Office Equipment £	Total £
<b>Cost</b>			
At 1 January 2021	42,202	4,429	46,631
Additions	10,536	-	10,536
Disposals	-	(72)	(72)
At 31 December 2021	<u>52,738</u>	<u>4,357</u>	<u>57,095</u>
<b>Depreciation and impairment</b>			
At 1 January 2021	13,957	2,141	16,098
Depreciation charged in the year	9,494	1,476	10,970
Eliminated in respect of disposals	-	(44)	(44)
At 31 December 2021	<u>23,451</u>	<u>3,573</u>	<u>27,024</u>
<b>Carrying amount</b>			
At 31 December 2021	<u>29,287</u>	<u>784</u>	<u>30,071</u>
At 31 December 2020	<u>28,245</u>	<u>2,289</u>	<u>30,534</u>

### 10 Fixed asset investments

	Listed securities £
<b>Cost or valuation</b>	
At 1 January 2021	-
Additions	251,373
At 31 December 2021	<u>251,373</u>
<b>Carrying amount</b>	
At 31 December 2021	<u>251,373</u>
At 31 December 2020	<u>-</u>

All the fixed asset investments are held in the UK.

# BRITISH & IRISH ORTHOPTIC SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2021

### 11 Debtors

	2021	2020
	£	£
<b>Amounts falling due within one year:</b>		
Trade debtors	3,599	63,544
Prepayments and accrued income	28,000	16,640
	<u>31,599</u>	<u>80,184</u>

### 12 Creditors: amounts falling due within one year

	2021	2020
	£	£
Trade creditors	23,344	18,869
Other creditors	277,000	181,041
Accruals and deferred income	97,437	46,275
	<u>397,781</u>	<u>246,185</u>

### Deferred Income

	£
Deferred income at 1 January 2021	695
Resources deferred during the year	1,665
Amounts released from previous years	(695)
Deferred income at 31 December 2021	<b>1,665</b>

# BRITISH & IRISH ORTHOPTIC SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2021

#### 13 Restricted funds

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Movement in funds			Movement in funds			Balance at 31 December 2021 £
	Balance at 1 January 2020 £	Incoming resources £	Resources expended £	Balance at 1 January 2021 £	Incoming resources £	Resources expended £	
Education and training projects	34,743	-	(9,750)	24,993	-	(24,993)	-
AHP workforce supply work stream	19,624	-	(12,176)	7,448	-	(7,448)	-
AHP support worker	-	20,000	-	20,000	-	(9,016)	10,984
Clinical placement expansion	-	88,746	-	88,746	-	(55,243)	33,503
NEAS	-	-	-	-	19,950	-	19,950
OBF Education Fund	-	-	-	-	364,395	(2,490)	361,905
	<u>54,367</u>	<u>108,746</u>	<u>(21,926)</u>	<u>141,187</u>	<u>384,345</u>	<u>(99,190)</u>	<u>426,342</u>

Education and training projects: this fund can be used for the training and education of orthoptists in the UK or overseas.

AHP workforce supply work stream: this fund can be used to increase CPD and taking steps to promote flexibility and career development.

AHP Support Worker: this fund can be used to increase CPD and taking steps to promote flexibility and career development.

Clinical placement expansion: this fund can be used to provide financial support and increase clinical placement opportunities.

NEAS: this fund can be used to increase placement opportunities to Orthoptic students.

OBF Educational Fund: this fund can be used to provide financial support for the education and further training of Orthoptists.



# BRITISH & IRISH ORTHOPTIC SOCIETY

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2021

#### 14 Analysis of net assets between funds

	Unrestricted funds 2021 £	Restricted funds 2021 £	Total 2021 £	Unrestricted funds 2020 £	Restricted funds 2020 £	Total 2020 £
Fund balances at 31 December 2021 are represented by:						
Tangible assets	30,071	-	30,071	30,534	-	30,534
Investments	-	251,373	251,373	-	-	-
Current assets/ (liabilities)	143,461	174,969	318,430	102,130	141,187	243,317
	<u>173,532</u>	<u>426,342</u>	<u>599,874</u>	<u>132,664</u>	<u>141,187</u>	<u>273,851</u>

#### 15 Related party transactions

##### Remuneration of key management personnel

The charity considers key management personnel comprise of the trustees and external management agencies, to whom the general management and running of the Society is outsourced.

The Articles of Association allow payments to the employers of the Chair and Vice Chair whilst performing functions and duties for the Society.

Payments were made in respect of V Greenwood (Chair) for £38,322 (2020 - £48,267) and J Cartledge (Vice Chair) £15,842 (2020 - £Nil). Payments were also made in respect of J Dowdney £Nil (2020 - £15,727), J Mehta - £7,504 (2020 - £1,169 ), F Bush £6,500 (2020 - £Nil) and J Adeoye £Nil (2020 - £8,892 )

Fees were payable to one (2020 - one) Business Manager during the year as follows:

British Dietetic Association - Management services £83,591 (2020 - £65,127)

The combined remuneration of the key management personnel was:

	2021 £	2020 £
Aggregate compensation	<u>68,168</u>	<u>136,841</u>

There were no employees of the Charity in either the current or prior year.

During the year, the charity collected fees of £119,416 (2020 - £114,774 ) from its members on behalf of the British Orthoptic Society Trade Union. At 31 December 2021, £249,298 (2020 - £177,991) was due to the British Orthoptic Trade Union.

## **List of Officers currently in post**

BIOS Council and Committee Officers/members - These appointments and roles were applicable in all or part of 2021:

### **BIOS Honorary Officers and trustees**

Veronica Greenwood, Chair

Julie Cartledge - Vice Chair

### **BIOS Trustees**

Midlands & East – Haseeb Ali (Jan-Jul 2021); Vacant (Aug-Dec 2021)

Northern - Deborah Podmore

Southern - Kelly MacKenzie

Northern Ireland - Declan McClements

Republic of Ireland - Jaina Byrne

Wales - Vacant (Jan-Jun 2021); Patrick Reedy (Jun-Dec 2021)

Scotland - Angela Carlin

Leads of Orthoptic Profession Chair: Sonia MacDiarmid (Jan-Jun 2021); Krishan Parmar (Jun-Dec 2021)

### **BOS TU Trustees (Jan-Jun 2021)**

As above BIOS honorary officers and trustees previously stated, omitting the Republic of Ireland

BOSTU advisor non-voting: Sam Aitkenhead

### **BOS TU Executive Board (Jun-Dec 2021)**

General Secretary: Sam Aitkenhead

President: Vacant

Wales: Vacant

Northern Ireland: Vacant

Scotland: Vacant

England: Joe Smith, John McBride and Vacant

### **BIOS Council members (non-voting)**

Journal: Jill Carlton Editor of Journal,

IOA Representative: David Newsham

OCE Representative: Anne Bjerre

Research Director: Anna Horwood (Jan-Jun 2021); Kerry Hanna (Jun-Dec 2021)

Education and Professional Development Committee Chair: Helen Davis

New Graduate Representative: Joe Smith (Jan-Jun 2021); Holly Kniazewycz (Jun-Dec 2021)

Public Health Lead: Jigs Mehta (Jan-Jun 2021); Fiona Bush (Jun-Dec 2021);

BOS TU Advisor (General Secretary from Jun 2021): Sam Aitkenhead