

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 2023		
List no:	530T		
Head or Main Office address:	3rd Floor		
	Interchange Place		
	151-165 Edmund Street		
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:	1217285633		
Contact name for queries regarding the completion of this return	Steven Doughty		
Telephone Number:	01634 840066		
E-mail:	Stevendoughty@tc-group.com		

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:

returns@certoffice.org

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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
	1,136	41	30	192	1,399
Total	1,136	41	30	192	A 1,399

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

1,025

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

No

x

If yes, state the name of that other union:

b. A federation of trade unions?

Yes

No

x

If yes, state the number of affiliated unions:

and names:

Officers in post

(see note 12)

Please complete list of all officers in post at the end of the year to which this return relates.

Name of Officer	Position held and date elected
Craig Murray	Chair (Elected 21/01/2023)
Julie Dowdney	Vice Chair (Elected 26/06/2018)
Sam Aitkenhead	BOSTU General Secretary (Elected 11/06/2021)

General Fund

(see notes 13 to 18)

	£	£
Income		
From Members: Contributions and Subscriptions		125,511
From Members: Other income from members (specify)		
Total other income from members		
Total of all income from members		125,511
Investment income (as at page 12)		
Other Income		
Income from Federations and other bodies (as at page 4)		
Income from any other sources (as at page 4)		
Total of other income (as at page 4)		
Total income		125,511
Interfund Transfers IN		
Expenditure		
Benefits to members (as at page 5)		
Administrative expenses (as at page 10)		
Federation and other bodies (specify)		
Administrative Expenses		41,161
Total expenditure Federation and other bodies		41,161
Taxation		
Total expenditure		41,161
Interfund Transfers OUT		
Surplus (deficit) for year		84,350
Amount of general fund at beginning of year		349,106
Amount of general fund at end of year		433,456

Analysis of income from federation and other bodies and other income

(see notes 19 and 20)

Description	£
Federation and other bodies	
Total federation and other bodies	
Any Other Sources	
Total other sources	
Total of all other income	

Analysis of benefit expenditure shown at the General Fund

(see notes 21 to 23)

			£
Representation – Employment Related Issues		brought forward	
		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)	
carried forward		Total (should agree with figure in General Fund)	

(See notes 21 and 23)

Fund 2		Fund Account		
Name:		£	£	
Income	From members			
	Investment income (as at page 12)			
	Other income (specify)			
	Total other income as specified			
	Total Income			
	Interfund Transfers IN			
Expenditure	Benefits to members			
	Administrative expenses and other expenditure (as at page 10)			
		Total Expenditure		
		Interfund Transfers OUT		
	Surplus (Deficit) for the year			
	Amount of fund at beginning of year			
	Amount of fund at the end of year (as Balance Sheet)			
	Number of members contributing at end of year			

Fund 3		Fund Account		
Name:		£	£	
Income	From members			
	Investment income (as at page 12)			
	Other income (specify)			
	Total other income as specified			
	Total Income			
	Interfund Transfers IN			
Expenditure	Benefits to members			
	Administrative expenses and other expenditure (as at page 10)			
		Total Expenditure		
		Interfund Transfers OUT		
	Surplus (Deficit) for the year			
	Amount of fund at beginning of year			
	Amount of fund at the end of year (as Balance Sheet)			
	Number of members contributing at end of year			

(See notes 21 and 23)

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

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

(See notes 21 and 23)

Fund 6		Fund Account	
Name:		£	£
Income	From members		
	Investment income (as at page 12)		
	Other income (specify)		
	Total other income as specified		
	Total Income		
	Interfund Transfers IN		
Expenditure	Benefits to members		
	Administrative expenses and other expenditure (as at page 10)		
	Total Expenditure		
	Interfund Transfers OUT		
	Surplus (Deficit) for the year		
	Amount of fund at beginning of year		
	Amount of fund at the end of year (as Balance Sheet)		
	Number of members contributing at end of year		

Fund 7		Fund Account	
Name:		£	£
Income	From members		
	Investment income (as at page 12)		
	Other income (specify)		
	Total other income as specified		
	Total Income		
	Interfund Transfers IN		
Expenditure	Benefits to members		
	Administrative expenses and other expenditure (as at page 10)		
	Total Expenditure		
	Interfund Transfers OUT		
	Surplus (Deficit) for the year		
	Amount of fund at beginning of year		
	Amount of fund at the end of year (as Balance Sheet)		
	Number of members contributing at end of year		

(See notes 21 and 23)

Fund 8		Fund Account	
Name:		£	£
Income	From members		
	Investment income (as at page 12)		
	Other income (specify)		
	Total other income as specified		
	Total Income		
	Interfund Transfers IN		
Expenditure	Benefits to members		
	Administrative expenses and other expenditure (as at page 10)		
	Total Expenditure		
	Interfund Transfers OUT		
	Surplus (Deficit) for the year		
	Amount of fund at beginning of year		
	Amount of fund at the end of year (as Balance Sheet)		
	Number of members contributing at end of year		

Fund 9		Fund Account	
Name:		£	£
Income	From members		
	Investment income (as at page 12)		
	Other income (specify)		
	Total other income as specified		
	Total Income		
	Interfund Transfers IN		
Expenditure	Benefits to members		
	Administrative expenses and other expenditure (as at page 10)		
	Total Expenditure		
	Interfund Transfers OUT		
	Surplus (Deficit) for the year		
	Amount of fund at beginning of year		
	Amount of fund at the end of year (as Balance Sheet)		
	Number of members contributing at end of year		

Political fund account

(see notes 24 to 33)

£

£

Political fund account 1		To be completed by trade unions which maintain their own political fund	
	Income		
	Members contributions and levies		
	Investment income (as at page 12)		
Other income (specify)			
		Total other income as specified	
		Total income	
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			
	Expenditure A (as at page i)		
	Expenditure B (as at page ii)		
	Expenditure C (as at page iii)		
	Expenditure D (as at page iv)		
	Expenditure E (as at page v)		
	Expenditure F (as at page vi)		
	Non-political expenditure (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	
Political fund account 2		To be completed by trade unions which act as components of a central trade union	
Income	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	
Expenditure	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	

The following pages 9i to 9vii relate to the Political Fund Account Expenditure

Political fund account expenditure (a)

Expenditure under section 72 (1) (a) of the Trade Union and Labour Relations (consolidation) Act.

To be completed where total expenditure from the political fund exceeds £2,000 during the period to which return relates.

Contribution to the funds of, or on the payment of expenses incurred directly or indirectly by a political party	
Name of political party in relation to which money was expended	Total amount spent during the period £
Total	

Political fund account expenditure (c)

Expenditure under section 72 (1) (a) of the Trade Union and Labour Relations (consolidation) Act.

To be completed where total expenditure from the political fund exceeds £2,000 during the period to which return relates.

Expenditure in connection with the registration of electors, the candidature of any person, the selection of any candidate or the holding of any ballot by the union in connection with any election to a political office

Title and Date of election	Name of political party/organisation	Name of candidate, organisation or political party (see 33(iii))	£
Total			

Political fund account expenditure (d)

Expenditure under section 72 (1) (a) of the Trade Union and Labour Relations (consolidation) Act.

To be completed where total expenditure from the political fund exceeds £2,000 during the period to which return relates.

Expenditure on the maintenance of any holder of political office	
Name of office holder	£
Total	

Political fund account expenditure (e)

Expenditure under section 72 (1) (a) of the Trade Union and Labour Relations (consolidation) Act.

To be completed where total expenditure from the political fund exceeds £2,000 during the period to which return relates.

The expenditure of money on the holding of any conference or meeting by or on behalf of a political party or of any other meeting the main purpose of which is the transaction of business in connection with a political party

Name of political party	£
Total	

Political fund account expenditure (f)

Expenditure under section 72 (1) (a) of the Trade Union and Labour Relations (consolidation) Act.

To be completed where total expenditure from the political fund exceeds £2,000 during the period to which return relates

On the production, publication or distribution of any literature, document, film, sound recording or advertisement the main purpose of which is to persuade people to vote for a political party or candidate or to persuade them not to vote for a political party or candidate	
Name of organisation or political party	£
Total	

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)

		£
Administrative Expenses		
Remuneration and expenses of staff		30,018
Salaries and Wages included in above	[Redacted]	
Auditors' fees		672
Legal and Professional fees		6,509
Occupancy costs		
Stationery, printing, postage, telephone, etc.		608
Expenses of Executive Committee (Head Office)		2,974
Expenses of conferences		
Other administrative expenses (specify)		
Bank Charges		36
[Redacted]		
Other Outgoings		
[Redacted]		
[Redacted]		
Outgoings on land and buildings (specify)		
[Redacted]		
Other outgoings (specify)		
Depreciation		344
[Redacted]		
Total		41,161
Charged to:	General Fund (Page 3)	
Total		

Analysis of officials' salaries and benefits

(see notes 36 to 46 below)

Office held	Gross Salary	Employers N.I. contributions	Benefits			Total
			Pension Contributions	Other Benefits		
				Description	Value	
	£	£	£		£	£
No officials receive a salary or pension						

Analysis of investment income

(see notes 47 and 48)

	Political Fund £		Other Fund(s) £
Rent from land and buildings			
Dividends (gross) from:			
Equities (e.g. shares)			
Interest (gross) from:			
Government securities (Gilts)			
Mortgages			
Local Authority Bonds			
Bank and Building Societies			
Other investment income (specify)			
		Total investment income	
		Credited to:	
		General Fund (Page 3)	
		Political Fund	
		Total Investment Funds	

Fixed assets account

(see notes 53 to 57)

	Land and Buildings		Furniture and Equipment £	Motor Vehicles £	Not used for union business £	Total £
	Freehold £	Leasehold £				
Cost or Valuation						
At start of year			2,386			2,386
Additions						
Disposals						
Revaluation/Transfers						
At end of year			2,386			2,386
Accumulated Depreciation						
At start of year			1,578			1,578
Charges for year			344			344
Disposals						
Revaluation/Transfers						
At end of year			1,922			1,922
Net book value at end of year						
Net book value at end of year			464			464
Net book value at end of previous year						
Net book value at end of previous year			808			808

Analysis of investments

(see notes 58 and 59)

	All Funds Except Political Funds £	Political Fund £
Quoted		
Equities (e.g. Shares)		
Government Securities (Gilts)		
Other quoted securities (to be specified)		
Total quoted (as Balance Sheet)		
Market Value of Quoted Investment		
Unquoted		
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		

Analysis of investment income (controlling interests)

(see notes 60 and 61)

Does the union, or any constituent part of the union, have a controlling interest in any limited company?

Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
------------------------------	--

If YES name the relevant companies:

Company name	Company registration number (if not registered in England & Wales, state where registered)

Are the shares which are controlled by the union registered in the names of the union's trustees?

Yes <input type="checkbox"/>	No <input type="checkbox"/>
------------------------------	-----------------------------

If NO, state the names of the persons in whom the shares controlled by the union are registered.

Company name	Names of shareholders

Summary sheet

(see notes 62 to 73)

	All funds except Political Funds	Political Funds £	Total Funds £
Income			
From Members	125,511		125,511
From Investments			
Other Income (including increases by revaluation of assets)			
Total Income	125,511		125,511
Expenditure (including decreases by revaluation of assets)			
Total Expenditure	41,161		41,161
Funds at beginning of year (including reserves)	349,106		349,106
Funds at end of year (including reserves)	433,456		433,456
Assets			
Fixed Assets			464
Investment Assets			
Other Assets			432,992
Total Assets			433,456
Liabilities			
Total Liabilities			0
Net Assets (Total Assets less Total Liabilities)			433,456

Summary sheet

(see notes 62 to 73)

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

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

(see notes 74 to 80)

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

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

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

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:	
			<small>(or other official whose position should be stated)</small>
Name:	Samantha Aitkenhead	Name:	Craig Murray
Date:	28/06/2024	Date:	28/06/2024

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

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

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:

S Meah

Name(s):

Sally Meah

Profession(s) or Calling(s):

Senior Auditor

Address(es):

Star House

Star Hill

Rochester

Kent

Postcode

ME1 1UX

Date

28/06/2024

Contact name for inquiries and telephone number:

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.

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 2023

BRITISH & IRISH ORTHOPTIC SOCIETY

LEGAL AND ADMINISTRATIVE INFORMATION

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

BRITISH & IRISH ORTHOPTIC SOCIETY

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BRITISH & IRISH ORTHOPTIC SOCIETY

TRUSTEE'S REPORT (INCLUDING DIRECTORS' REPORT)

FOR THE YEAR ENDED 31 DECEMBER 2023

The trustees present their annual report and financial statements for the year ended 31 December 2023.

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

The British and Irish Orthoptic Society (BIOS) continues to meet the charitable aims through all of its activities:

"The objects for which the Society is established are for the public benefit to advance education in orthoptics and cognate subjects and to encourage the study and improve the practice of orthoptics with a view to maintaining and raising standards in clinical and scientific orthoptics."

We have continued to represent the profession nationally holding seats on the Allied Health Professions Federation Board, the Clinical Council for Eye Health Commission, The UK Ophthalmology Alliance Board, and the Royal College of Ophthalmologists Paediatric Sub Committee. We have positively engaged with the Regulator (HCPC) and contributed to a number of workstreams and consultations.

2023 saw the return of the first face to face annual BIOS Conference which was held in Belfast. This was a successful event which set a new record for attendance at the annual conference with over 150 orthoptists from across the UK and ROI in attendance. The conference also introduced a dedicated section for student orthoptists to present their research/project work that they were undertaking as part of their pre-registration studies and all three universities were represented.

After the AGM in 2023 we honoured the following Orthoptists with BIOS awards for their dedication and service to BIOS in their voluntary roles:

Clinical and Non Clinical Advisory Group Leads

- Declan McClements - Medical Retina CAG
- Lorraine Manklow - Medical Retina CAG
- Sajida Hanif - VPD Cag

Contributions to BIOS

- Nadia Northway - EPDC
- Vienna Jay Burchell - EPDC
- Rebecca Flynn - EPDC
- Janice Hoole - EPDC
- Judith Gray - LOOP
- Helen Haggarty - LOOP
- Sonia MacDiarmid - LOOP
- Teniola Soyoye - Work Experience Lead

BRITISH & IRISH ORTHOPTIC SOCIETY

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

FOR THE YEAR ENDED 31 DECEMBER 2023

The 2023 AGM saw the end of Veronica Greenwood's second term as Chair of BIOS. The Board of Trustees put on record the incredible leadership that Veronica has provided to BIOS since she became Chair. In her role, she had led the development of the professional body to a dynamic, financially stable organisation that is in a strong position to continue to advocate for its members and the profession more widely. Veronica was awarded with a BIOS Fellowship by the new Chair, Craig Murray.

During the AGM in 2023, BIOS formally welcomed Clarie McEntee as the new Trustee for the Republic of Ireland as well as Craig Murray as Chair.

The conference also saw the official launch of a new strategy laying out our key priorities for delivering on our vision of a "sustainable, thriving and visible profession dedicated to the improvement of the eye health of the population". It identifies four key themes, underpinned by a series of commitments to a recognised foundational culture. In particular, the strategy aligns with NHS workforce reform projects and the long term workforce plan which sets out the need for continued workforce development and reform which will enable orthoptics to continue to thrive as an autonomous profession into the future.

The Trustees, Council, standing committee members, clinical advisory group leads and other volunteers have continued to represent BIOS throughout 2023 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.

There have been a number of projects and workstreams which have come to a positive conclusion in the last year which have attracted funding from HEE. These include the development of the orthoptic support workforce, clinical education and advanced practice for example. Projects which are a continuation of some of these these have also started this year e.g. the placement hub project funded by NHSE which aims to further increase placement capacity. This, along with the success of the Clinical Placement Expansion Project which created the PERL and livestream clinics aims to continue to increase the capacity of placements to enable increased numbers of orthoptists in training to meet future workforce needs.

BIOS has contributed funding and is a stakeholder in a project lead by the College of Optometrists to create a national dashboard which will inform commissioners and other stakeholders of the current picture of UK eyecare workforce as well as future need based on disease prevalence. The dashboard is due for launch in Spring 2024.

BIOS have also initiated a piece of work which will build the evidence and narrative which will be presented to the General Optical Council to argue the case for orthoptists having the legal right to prescribe spectacle corrections within the Hospital Eye Service.

The end of 2023 and to early 2024 saw BIOS move to independent operations. Between 2018 and 2024 BIOS had a service level agreement with another professional body to provide business support. This agreement came to an end in March 2024 with staff members undergoing a TUPE process to be employed directly by BIOS. This was a smooth process and is an exciting opportunity for BIOS to continue to develop as a modern, dynamic professional body.

Craig Murray – Chair BIOS

Julie Dowdney – Vice Chair BIOS

BIOS Trustees' Report

The new BIOS five-year Strategy was launched at the 2023 Conference, identifying four key themes: to develop BIOS's operational resilience; to lead the development of the profession; to improve visibility, recruitment and retention; and to lead innovation within the profession. There is a particular focus now on working towards independent prescribing, ensuring a coherent definition of core orthotic practice, and actively supporting a diversity of routes into the profession. There remains a continuing focus on areas such as growing our membership and promoting greater recruitment into the profession.

In the Trustees' report, we highlight our achievements in 2023 against the priorities from our new strategic plan.

Develop BIOS operational resilience

BIOS has continued to focus on ensuring the future of the Society through supporting and representing an involved and committed membership. However, the new Strategy places an explicit emphasis on the need to develop leaders within BIOS, to ensure succession planning, and, particularly with the end of our management agreement with the British Dietetic Association (BDA), developing opportunities for BIOS to operate independently.

BIOS Structural Changes

Throughout 2023, we've been focused on providing a new structure for the future of BIOS's operational staff. For the previous six years, this has been managed by staff employed by the BDA, but in the second half of the year we started the process of transferring staff across to be directly employed by BIOS, a process that was completed in March 2024. This provides us with stability and the scope to further expand and develop the work we're doing over the coming years.

BIOS Conference and AGMs 2024

In July we held the first face-to-face BIOS Conference since the COVID pandemic in Belfast. This was a huge success, attracting over 170 delegates, representing over 10% of the orthoptic workforce. We had 36 presentations over two days, as well as Q&As, poster presentations and networking opportunities. Work is now underway for the 2024 Conference in Manchester.

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 are committed to continuing to provide this.

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.

Member Benefits

We continue to develop new resources and sources of information for members. In July, we launched the BIOS Online Archives, free to members, providing digital versions of pass lists, photos, and orthoptic equipment from the Wellcome Collection. In August, a new webpage on Equality, Diversity and Inclusion went live, multi-faith calendar, articles on events, extra resources and signposting on becoming an EDI champion. We have since begun working towards our goal of every department having an EDI champion.

A particular focus towards the end of the year was improving our communication with members, to support awareness of the work done by BIOS and the benefits available to members. In November we therefore launched a survey of members to get views on our current communications, including the e-zines, online forums, social media, and the members' area of the website. In response to this, we launched a new look e-zine in January and are continuing to work towards a relaunch of the website and changes to the online forums.

BIOS is entirely reliant on the contributions of members of the profession to lead on and deliver on the aims of our strategic plan. Part of the focus of our communications review is therefore to better highlight the work that we're doing and the opportunities to volunteer. Towards the end of the year, we produced a number of profiles on Trustees, something we will be continuing into 2024.

Lead the development of the profession

BIOS's core work remains to ensure high standards across the orthoptic profession, through setting and maintaining standards and guidance, but also through identifying and supporting the future development of orthoptics.

Setting standards

Our Education and Professional Development Committee (EPDC) and our CAGs continue to maintain up-to-date standards and competencies for our members. They also work with other organisations in their fields to produce collaborative guidelines and documentation.

- We launched a revised Orthoptic Curriculum Framework in September, adding in content covering sustainability, EDI, quality assurance, and personal health and wellbeing. The new Framework is also aligned to the Advanced Practice 'pillars' – around clinical practice, education, research, and leadership and management.
- The Stroke and Neuro Rehab CAG produced a revised Orthoptic Stroke/Neuro Rehab Care Pathway in April.
- The Leaders of the Orthoptic Profession (LOOP) steering group produced a guide on the importance of Integrated Care Systems and the importance of orthoptic involvement.
- The Glaucoma CAG produced guidance on extended role training within this field.
- The Medicines CAG produced a position statement in July to address the complexities surrounding the use of medical exemptions, strongly advocating the autonomous use of Medicine Exemptions by orthoptists within the scope of their clinical practice.

Advanced Practice

As part of the workforce development programme, led by an expert working group of dietitians and orthoptists, we developed a suite of resources to support advanced clinical practice (ACP), including case studies, videos, and sample job plans and business cases, hosted on our ACP pages. These were launched as part of the second National Advanced Practice Conference in November.

Support Workforce

We hugely expanded our resources and guidance for our support workforce in 2023, creating an information hub on our website for orthoptic clinical assistants. This includes Roles and Responsibilities Guidance, an FAQ document, and case studies. We also hosted a webinar to celebrate the support workforce and are continuing to work to identify areas to further support the development of these roles.

Workforce Survey

Following our first survey of the workforce in the Republic of Ireland, we repeated our Orthoptic Workforce Survey across the UK. This data has been used to baseline information for enhanced role scoping and reviewing the core curriculum, negotiations across the UK and Ireland, and for inclusion in the National Eyecare Workforce Survey.

Independent Prescribing

January saw the launch of the Prescribing Now Campaign, a joint campaign with other AHP professional associations, calling on the government to extend independent prescribing responsibilities to orthoptists, and other professions, to provide more timely care for patients and better support overstretched health services. This was launched with a letter to the Secretary of State and an associated social media campaign encouraging members to contact their MP. We received backing from the Royal College of Ophthalmologists in August, who wrote to Health Minister Will Quince to highlight the benefits to eye care services of extending IP to orthoptists.

Stroke Rehabilitation

The updated *NICE Guideline on Stroke Rehabilitation in Adults* recommended that stroke patients should be offered a specialist orthoptic assessment as soon as possible, highlighting the massive strides made towards cementing the place of orthoptists within the stroke care team. This reflects the huge amount of work done by the BIOS Stroke and Neuro Rehab CAG on behalf of the profession.

Improve visibility, recruitment & retention

We have continued to emphasise the need to increase the visibility of Orthoptics, actively representing orthoptic professionals at all levels, but also supporting recruitment to ensure the future of the profession.

Visibility

We have continued to work hard throughout 2023 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.

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 270,500 impressions, and our followers increased to 2526.
- Our Facebook page passed a thousand followers in February, reaching 1050 followers by the end of the year. Our posts had over 128,000 impressions in 2023.
- Our LinkedIn page remains relatively new but we've made a concerted effort to increase our reach, resulting in a 60% increase in followers, and 50,000 impressions, over double that of 2022.

One key focus of our social media activity was around the events of World Orthoptic Day, which we used to launch our new Advanced Clinical Practice pages. We achieved 17,000 impressions on Twitter and 3,500 impressions on Facebook on the day alone. Much of our content on social media is aimed at growing awareness of our website, providing a hub for information on orthoptics in the UK and Ireland. We had over 700,000 user engagements in 2023, with over 6,000 visitors each month. Our visibility on search engines has continued to increase with almost 55,000 clicks through from Google and 1.7 million impressions. This has led to a further 20% increase in visits to our public information pages, with over 153,000 user engagements.

Recruitment

As part of the HEE-funded workforce development programme, we developed entirely new careers resources, including updating and rebranding our web pages, creating a series of promotional flyers, postcards and banners, and creating videos for use on the website and social media. These were launched in May and members can download them for free for use at careers events.

We also received specific funding to encourage recruitment in the Republic of Ireland, which we used to create targeted careers leaflets and a video of Orthoptists across different clinical settings, speaking about their career and working in Ireland.

We continue to explore and encourage new routes into the profession. A second post-graduate pre-registration orthoptics course was launched at the University of Liverpool in January, with the first cohort of the MSc at UCL graduating in the summer. Level 6 orthoptic (pre-registration) degree apprenticeship pre-proposal documentation was submitted and a scoping exercise was completed to support the development of an orthoptic enhanced clinical practice apprenticeship curriculum. The aim is for this to be launched in 2024.

Preceptorship

We collected evidence of best practice and have created a series of case studies of early orthoptic careers, highlighting the vital role of preceptorship for new graduates, as well as a new guidance document for preceptors, Heads of service, or professional leads on using our preceptorship programme. These have been incorporated into a newly expanded New Graduates & Preceptorship page on the website.

Representing the profession

BIOS also plays a significant role in 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 2023 we responded to a number of consultations and calls for evidence on behalf of our members:

- Following the publication of the NHS Long-term Workforce Plan, we responded highlighting the need to underpin the plans with adequate funding to increase workforce numbers and to ensure staff are sufficiently compensated.
- We provided evidence to the NHSE engagement around in-school eye testing for pupils in special schools in England.
- We responded to the Health Care Professions Council (HCPC) consultation on the revised Standards of conduct performance and ethics in June.

We have worked alongside other similar organisations to campaign and promote issues of particular significance to our members.

- Following the announcement of the HCPC fee increase, we joined with a number of other professional bodies and trade unions to lend greater weight to our opposition but also to raise further concerns about the service provided by the Council.
- Alongside other members of the Clinical Council for Eye Health Commissioning, in January we wrote to NHS England to raise concerns about delays and lack of progress in the commissioning of an NHS England Special School Eye Care Service (SSECS). Following the announcement in October that NHS England intends to extend in-school eye testing to pupils in all special schools in England, we have continued to engage with stakeholders on the nature of the service.
- We have continued to work as part of the coalition to promote the need for better investment and planning of the specialist workforce for children and young people. This included a letter in March, following the publication of the Special Educational Needs and Disabilities (SEND) and Alternative Provision (AP) Improvement Plan, making clear in the letter the need to address shortages in trained staff immediately.

Lead innovation within the profession

We continue to invest in promoting innovation within the profession, including ongoing CPD, research by orthoptists, and innovations within orthoptic education and practice-based learning (PBL).

CPD and Networking

Our Clinical and non-Clinical Advisory Groups (CAGs and nCAGs) along with the Trustees have continued to host both virtual and face-to-face events, enabling more members to access CPD, both on the day and via the recordings provided for free to members. BIOS held 23 events in 2023, including study days, regional meetings and discussion events, with over 1,000 places booked.

Some of the highlights were:

- A Paediatric Ophthalmology, Glaucoma and Medicines joint study day, an exciting first, delivering training reflective of the changing landscape of ophthalmic care and the integrated nature in which this is delivered.
- The Neuro Orthoptic study day in Liverpool, covering subjects such as neuroimaging, OCT, and the impact of weight loss drugs on IIH.
- The BIOS Preceptorship Webinar in September, saw the launch of our New Grad and Preceptorship web page, including best practice case studies, and the *BIOS Guide for Preceptors, Heads of Service and Professional Leads*.
- Our Orthoptic support workforce webinar celebrated our support workforce and marked the launch of our new Support Workforce Hub.

We continue to provide recordings of all of our online CPD free to access for all BIOS members.

Orthoptic Education Fund (OEF)

The OEF provides small grants to orthoptic professionals and students to support them with education and training. In 2023 we gave out £4,432 across eight members, to support conference attendance and post-graduate modules.

BRITISH & IRISH ORTHOPTIC SOCIETY

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

FOR THE YEAR ENDED 31 DECEMBER 2023

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. In 2023 we awarded a joint research grant with Fight For Sight to Lauren Hepworth, to support her work adapting a cognitive screening test for stroke survivors. We also provided funding for three further pump-priming awards to support new researchers in the profession and launched a joint research award alongside BIPOSA, to fund clinicians at any career stage, to undertake a specific formal research training course enabling them to undertake research relating to children's vision or eye disorders.

British and Irish Orthoptics Journal (BIOJ)

BIOJ, the official journal of BIOS, has come to be recognised as an authoritative resource in areas related to clinical ocular motility, visual function, amblyopia, binocular vision and strabismus. It published 15 articles in 2023. Fully open-access, the BIOJ website received over 3,000 page views a month.

Practice-Based Learning (PBL)

The Placement Expansion Resource Library (PERL), continues to be a valued resource to support clinical placements, receiving over 8,000 views in 2023. This was rebranded in 2023 as part of the workforce development programme, which also included a report on the feasibility of a common assessment tool (CAT) for clinical placements and the creation of a PBL section on the BIOS website including case studies and guidance demonstrating the full range of PBL.

In June, with further support from NHSE, a year-long project was started to increase clinical placement capacity by creating an integrated simulated practice-based education programme for pre-registration Orthoptic students. This will build on the success of PERL. In July, we joined with eight other AHP professional associations to support the growth and quality of practice-based learning through the launch of a co-badged set of principles for PBL.

Financial review

The Society reports a net deficit of £64,567 for the year (2022 – net deficit of £62,914). Free reserves at 31 December 2023 were £88,251 (2022 - £99,493). Restricted funds at 31 December 2023 amounted to £384,142 (2022 - £437,467). During the year, total income was £357,346, comprised of all unrestricted income from membership subscriptions and course income. Total expenditure was £460,132 which comprised of unrestricted spend of £406,807 and restricted spend of £53,325. Where there were no new sources of restricted monies during 2023, all of the restricted expenditure related to b/fwd reserves for Apprenticeships to develop the support worker roles, OBF Education Fund to provide financial support for the education and further training of Orthoptists, Clinical placement expansion to provide support and increase clinical placement opportunities and AHPF support worker to promote career development.

The charity is looking into further opportunities from 2024 to support the long term vision of a sustainable, thriving and visible profession dedicated to the improvement of the eye health of the population. Funding prospects are in place to increase capacity and reach for future projects.

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.

BRITISH & IRISH ORTHOPTIC SOCIETY

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

FOR THE YEAR ENDED 31 DECEMBER 2023

Reserves policy

The Trustees have considered the level of activity within the charity and believe a level of free reserves of £235,00 is sufficient to support the ongoing operation of the society in the foreseeable future. At 31 December 2023, the Society has free reserves of £88,251 (2022 - £99,493). The Trustees are aware that this is below the stated target and are focused on replenishing these reserves over the coming years. The restricted reserves at 31 December 2023 is £384,142 and this will help support the charity objectives and projects in future years.

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.

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 Chair of the Leaders of the Orthoptic Profession (LOOP) is also a Trustee.

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 roles.

BIOS Council and Committee Officers/members - These appointments and roles were applicable in all or part of 2023:

BIOS Honorary Officers and trustees

Veronica Greenwood, Chair (left in 2023)

Craig Murray - Chair (appointed in 2023)

Julie Dowdney - Vice Chair

BIOS Trustees

Midlands & East – Rebecca Pinches

Northern - Deborah Podmore

Southern - Kelly MacKenzie

Northern Ireland - Declan McClements

Republic of Ireland - Vacant

Northern Ireland - Vacant (Jan-Aug 2023) Claire McEntee (Sept-Dec 2023)

Wales - Patrick Reedy

Scotland - Angela Carlin

Leads of Orthoptic Profession Chair: Krishan Parmar

BRITISH & IRISH ORTHOPTIC SOCIETY

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

FOR THE YEAR ENDED 31 DECEMBER 2023

BOS TU Executive Board

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

BIOS Council members (non-voting)

British and Irish Orthoptic Journal (BIOJ) Editor: Gemma Arblaster
IOA Representative: Jigs Mehta
OCE Representative: Nadia Northway
Research Director: Kerry Hanna
Education and Professional Development Committee Chair: Helen Davis
New Graduate Representative: Holly Kniazewycz
Public Health Lead: Fiona Bush
BOSTU (General Secretary): Sam Aitkenhead

Clinical Advisory Group Leads

Falls - Jigs Mehta
Retinal Disease - Annabelle Searle & Clare Cooley
Glaucoma – Katie Meakings
Neuro Orthoptics and 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
Medicines - Lorraine North & Karzan Hughes

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

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 General Secretary are in regular communications via email, telephone, Zoom 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.

BRITISH & IRISH ORTHOPTIC SOCIETY

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

FOR THE YEAR ENDED 31 DECEMBER 2023

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.

.....

Craig Murray

Trustee

Dated:

BRITISH & IRISH ORTHOPTIC SOCIETY

INDEPENDENT EXAMINER'S REPORT

TO THE TRUSTEES OF BRITISH & IRISH ORTHOPTIC SOCIETY

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 2023.

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 the Association of Chartered Certified Accountants, 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, FCCA
On behalf of TC Group
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 2023

		Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £	Unrestricted funds 2022 £	Restricted funds 2022 £	Total 2022 £
	Notes						
Income and endowments from:							
Donations and legacies	2	-	-	-	-	185,649	185,649
Charitable activities	3	356,171	-	356,171	305,914	-	305,914
Other income	4	1,175	-	1,175	1,375	-	1,375
Total income		357,346	-	357,346	307,289	185,649	492,938
Charitable activities	5	406,807	53,325	460,132	352,324	174,524	526,848
Net gains/(losses) on investments		38,219	-	38,219	(29,004)	-	(29,004)
Net expenditure and movement in funds		(11,242)	(53,325)	(64,567)	(74,039)	11,125	(62,914)
Reconciliation of funds:							
Fund balances at 1 January 2023		99,493	437,467	536,960	173,532	426,342	599,874
Fund balances at 31 December 2023		88,251	384,142	472,393	99,493	437,467	536,960

The statement of financial activities includes all gains and losses recognised in the year. All income and expenditure derive from continuing activities.

BRITISH & IRISH ORTHOPTIC SOCIETY**STATEMENT OF FINANCIAL POSITION****AS AT 31 DECEMBER 2023**

		2023		2022	
	Notes	£	£	£	£
Fixed assets					
Tangible assets	9		19,973		21,260
Investments	10		257,422		228,760
			<u>277,395</u>		<u>250,020</u>
Current assets					
Debtors	11	25,803		10,491	
Cash at bank and in hand		678,274		699,087	
		<u>704,077</u>		<u>709,578</u>	
Creditors: amounts falling due within one year	12	(509,079)		(422,638)	
		<u>194,998</u>		<u>286,940</u>	
Net current assets			194,998		286,940
			<u>472,393</u>		<u>536,960</u>
Total assets less current liabilities			472,393		536,960
			<u>472,393</u>		<u>536,960</u>
Net assets excluding pension liability			472,393		536,960
			<u>472,393</u>		<u>536,960</u>
			<u>472,393</u>		<u>536,960</u>
The funds of the charity					
Restricted income funds	13		384,142		437,467
Unrestricted funds			88,251		99,493
			<u>472,393</u>		<u>536,960</u>
			<u>472,393</u>		<u>536,960</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 2023.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

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.

BRITISH & IRISH ORTHOPTIC SOCIETY

STATEMENT OF FINANCIAL POSITION (CONTINUED)

AS AT 31 DECEMBER 2023

The financial statements were approved by the trustees on

.....

Craig Murray

Trustee

Company registration number 01892427 (England and Wales)

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 or grantors 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.

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 the statement of financial activities.

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.

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2023

1 Accounting policies**(Continued)*****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.

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

	Restricted funds	Total
	2023	2022
	£	£
Grants	-	185,649
	<u> </u>	<u> </u>

BRITISH & IRISH ORTHOPTIC SOCIETY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2023

3 Income from charitable activities

	Unrestricted funds 2023 £	Unrestricted funds 2022 £
Member's subscriptions	316,044	293,727
Course income	40,127	12,187
	<hr/>	<hr/>
	356,171	305,914
	<hr/> <hr/>	<hr/> <hr/>

4 Other income

	Unrestricted funds 2023 £	Unrestricted funds 2022 £
Advertising income	1,150	1,350
Sundry income	25	25
	<hr/>	<hr/>
	1,175	1,375
	<hr/> <hr/>	<hr/> <hr/>

BRITISH & IRISH ORTHOPTIC SOCIETY**NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)****FOR THE YEAR ENDED 31 DECEMBER 2023****5 Charitable activities**

	Activities	Activities
	2023	2022
	£	£
Secondment costs	126,327	250,137
Courses and conferences	33,359	16,156
Journal	12,267	10,948
Contribution to awards	2,608	127
	<u>174,561</u>	<u>277,368</u>
Share of support costs (see note 6)	225,091	198,432
Share of governance costs (see note 6)	60,480	51,048
	<u>460,132</u>	<u>526,848</u>
Analysis by fund		
Unrestricted funds	406,807	352,324
Restricted funds	53,325	174,524
	<u>460,132</u>	<u>526,848</u>
For the year ended 31 December 2022		
Unrestricted funds	352,324	
Restricted funds	174,524	
	<u>526,848</u>	

6 Support costs allocated to activities

	Charitable activities 2023 £	Total 2022 £
Depreciation	13,483	11,170
Office Costs	1,620	2,586
Insurance	46,537	42,507
Telephone and postage	3,948	412
Bank charges	5,360	5,045
Business management charges	117,193	93,480
Computer costs	17,753	13,047
Legal, professional and consultancy fees	(6,346)	886
Training costs	(616)	5,120
Advertising and marketing	12,601	1,219
Other consulting	12,036	22,960
Governance	60,480	51,048
	<u>284,049</u>	<u>249,480</u>
	2023 £	2022 £
Governance costs comprise:		
Accountancy	42,144	38,956
AGM, committee and officer's expenses	18,336	12,092
	<u>60,480</u>	<u>51,048</u>

Independent examiner's remuneration - £ (2022 - £1,824)

Independent examiner's remuneration - accountancy - £ (2022 £2,180)

7 Trustees

The trustees (or any persons connected with them) received remuneration or benefits from the charity during the year as detailed in the Related Party Note 16 totaling £140,105 (2022 - £85,038).

During the year, 7 Trustees received £1,317 reimbursement of expenses (2022 - £1,230 to 4 Trustees).

8 Taxation

The charity is exempt from taxation on its activities because all its income is applied for charitable purposes.

BRITISH & IRISH ORTHOPTIC SOCIETY

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2023

9 Tangible fixed assets

	Website £	Office Equipment £	Total £
Cost			
At 1 January 2023	54,880	5,116	59,996
Additions	12,539	-	12,539
Disposals	-	(2,729)	(2,729)
	<hr/>	<hr/>	<hr/>
At 31 December 2023	67,419	2,387	69,806
	<hr/>	<hr/>	<hr/>
Depreciation and impairment			
At 1 January 2023	34,427	4,308	38,735
Depreciation charged in the year	13,484	-	13,484
Eliminated in respect of disposals	-	(2,386)	(2,386)
	<hr/>	<hr/>	<hr/>
At 31 December 2023	47,911	1,922	49,833
	<hr/>	<hr/>	<hr/>
Carrying amount			
At 31 December 2023	19,508	465	19,973
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
At 31 December 2022	20,453	807	21,260
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

10 Fixed asset investments

	Listed securities £
Cost or valuation	
At 1 January 2023	228,760
Valuation changes	28,662
	<hr/>
At 31 December 2023	257,422
	<hr/>
Carrying amount	
At 31 December 2023	257,422
	<hr/> <hr/>
At 31 December 2022	228,760
	<hr/> <hr/>

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 2023

11 Debtors

	2023	2022
	£	£
Amounts falling due within one year:		
Trade debtors	1,803	6,689
Other debtors	853	-
Prepayments and accrued income	23,147	3,802
	<u>25,803</u>	<u>10,491</u>
	<u><u>25,803</u></u>	<u><u>10,491</u></u>

12 Creditors: amounts falling due within one year

	2023	2022
	£	£
Trade creditors	13,592	11,500
Other creditors	436,510	352,159
Accruals and deferred income	58,977	58,979
	<u>509,079</u>	<u>422,638</u>
	<u><u>509,079</u></u>	<u><u>422,638</u></u>

Deferred Income

	£	£
Deferred income at 1 January 2023	4,240	1,665
Resources deferred during the year	7,050	4,240
Amounts released from previous years	(4,240)	(1,665)
Deferred income at 31 December 2023	7,050	4,240

13 Restricted funds

The restricted funds of the charity comprise the unexpended balances of donations and grants held on trust subject to specific conditions by donors as to how they may be used.

	Movement in funds					
	Balance at 1 January 2022	Incoming resources	Resources expended	Balance at 1 January 2023	Resources expended	Balance at 31 December 2023
	£	£	£	£	£	£
AHP support worker	10,984	416	(385)	11,016	(1,604)	9,412
Clinical placement expansion	33,503	2,458	(14,737)	21,224	(3,054)	18,170
NEAS	19,950	-	(19,950)	-	-	-
OBF Education Fund	361,905	6,942	(8,005)	360,841	(5,071)	355,770
AHP Workfare Reform	-	120,000	(120,000)	-	-	-
ROI Workforce	-	5,833	(5,833)	-	-	-
Apprenticeships	-	50,000	(5,614)	44,386	(43,596)	790
	<u>426,342</u>	<u>185,649</u>	<u>(174,524)</u>	<u>437,467</u>	<u>(53,325)</u>	<u>384,142</u>

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

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

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

Apprenticeships: this fund can be used to develop the support worker roles and responsibilities guidance and competency scoping along with future curriculum design for apprenticeships with surveys and clinical activity reviews.

NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2023

14 Unrestricted funds

The unrestricted funds of the charity comprise the unexpended balances of donations and grants which are not subject to specific conditions by donors and grantors as to how they may be used. These include designated funds which have been set aside out of unrestricted funds by the trustees for specific purposes.

	At 1 January 2023	Incoming resources	Resources expended	Gains and losses	At 31 December 2023
	£	£	£	£	£
General funds	99,493	357,346	(406,807)	38,219	88,251
	<u>99,493</u>	<u>357,346</u>	<u>(406,807)</u>	<u>38,219</u>	<u>88,251</u>
Previous year:	At 1 January 2022	Incoming resources	Resources expended	Gains and losses	At 31 December 2022
	£	£	£	£	£
General funds	173,532	307,289	(352,324)	(29,004)	99,493
	<u>173,532</u>	<u>307,289</u>	<u>(352,324)</u>	<u>(29,004)</u>	<u>99,493</u>

15 Analysis of net assets between funds

	Unrestricted funds 2023 £	Restricted funds 2023 £	Total 2023 £
At 31 December 2023:			
Tangible assets	19,973	-	19,973
Investments	-	257,422	257,422
Current assets/(liabilities)	68,278	126,720	194,998
	<u>88,251</u>	<u>384,142</u>	<u>472,393</u>
	<u>88,251</u>	<u>384,142</u>	<u>472,393</u>
	Unrestricted funds 2022 £	Restricted funds 2022 £	Total 2022 £
At 31 December 2022:			
Tangible assets	21,260	-	21,260
Investments	-	228,760	228,760
Current assets/(liabilities)	78,233	208,707	286,940
	<u>99,493</u>	<u>437,467</u>	<u>536,960</u>
	<u>99,493</u>	<u>437,467</u>	<u>536,960</u>

16 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 - left 2023) for £25,527 (2022 - £38,634) and J Dowdney (Vice Chair) £20,743 (2022 - £17,670), C Murray (Chair - appointed 2023) £28,408 (2022 - £7,102), D Podmore £5,513 (2022 - £Nil). Payments were also made to twelve (2022 - four) other Consultants, trustees or council members as follows: £59,914 (2022 - £21,632).

Fees were payable to one (2022 - one) Business Manager during the year as follows:

British Dietetic Association - Management services £110,757 (2022 - £93,480)

The combined remuneration of the key management personnel was:

	2023	2022
	£	£
Aggregate compensation	140,105	85,038
	<u> </u>	<u> </u>

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

During the year, the charity collected fees of £125,511 (2022 - £126,759) from its members on behalf of the British Orthoptic Society Trade Union. At 31 December 2023, £433,457 (2022 - £349,106) was due to the British Orthoptic Trade Union.

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 reporting period preceding 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

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

Yes

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	
Address	
Date	
Contact name and telephone number	

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

If "No" Please explain below:

[Large greyed-out area for explanation]

Signature	
Name	Steven Doughty
Office held	Finance Director
Date	08.11.2024