iOH

The Association of Occupational Health and Wellbeing Professionals

Trustees' Annual Report

For the period 5 April 2025 to 4 April 2026

This report sets out the activities, achievements, and financial performance of iOH for the year ended 4 April 2026.

Charity registration number	1205635
Registered address	61 Waverley Road, Kenilworth, CV8 1JL

1. Objectives and Activities

Charitable purpose

iOH exists to advance public health through the promotion of excellence in occupational health (OH) and wellbeing practice. With over 1,550 members across the UK, the charity supports occupational health and wellbeing professionals at every stage of their careers, from students to senior leaders, through education, peer support and advocacy.

The charity's mission is to improve the health of the working-age population by equipping OH professionals with the knowledge, skills and networks required to deliver high-quality, evidence-based care.

Activities for public benefit

- Providing continuing professional development (CPD) through online resources, webinars, networking events, and the quarterly journal *OH Today*.
- Offering grant funding to members to support attendance at short courses, academic conferences and qualifications.
- Delivering a peer support service offering career advice, CPD guidance, reflective practice support, revalidation and professional registration assistance for occupational health nurses, occupational health doctors and other regulated occupational health and wellbeing practitioners where applicable, alongside practical workplace advice.

Public benefit statement

The trustees confirm that they have had due regard to the Charity Commission's guidance on public benefit (CC3).

iOH delivers public benefits by improving the capability of occupational health professionals, enabling evidence-based practices and supporting collaboration across the profession. Primary beneficiaries are OH professionals, with secondary benefits extending to employers, employees, and wider society through improved workplace health outcomes.

Impact is demonstrated through member feedback, which highlights improvements in reflective practice, application of learning, and dissemination of knowledge within organisations. Over 1,500 members were supported during the year through CPD, mentoring, peer support, guidance, and access to professional learning. While impact data is currently based on self-reported feedback, the charity continues to strengthen its evaluation processes through enhanced surveys and follow-up assessment.

Membership growth to 1,550 (a 19% annual increase) enabled iOH to extend its member support offer, including access to an employee assistance programme. This directly supported members experiencing distress and indirectly benefited their service users through improved practitioner wellbeing, confidence and capability.

The trustees consider that these activities demonstrably further the charity's purposes for public benefit.

Grant-making policy

The iOH training grant scheme supports members, including trainees, in continuing professional development and career progression. Grants are typically capped at £250 per member per year, with up to £1,000 allocated annually, subject to available funds and trustee discretion. Funding supports tuition, examination and course fees but excludes travel, accommodation and statutory training.

The Friends of iOH initiative enables organisations and individuals to contribute through annual donations, with all funds directed towards expanding access to education and training opportunities.

Social investment and member engagement

The charity supports attendance at educational conferences through member grants, encouraging knowledge exchange, collaboration and reduction of professional isolation. iOH also maintains an active online community through social media platforms and a members-only portal to facilitate engagement and peer support.

Contribution of volunteers

The charity is primarily volunteer-led, with trustees and members contributing significant time and expertise to deliver governance, education, peer support and communications activities. This contribution is essential to the charity's effectiveness and ability to operate efficiently.

2. Achievements and Performance

During the reporting period, iOH delivered a range of initiatives aligned to its charitable objectives. The trustees consider performance to be strong, with increased member engagement, continued education and peer support activity, and further development of the charity's operating model.

Workforce development and inclusion

- Provision of free and low-cost membership options to support accessibility for students and early-career professionals.
- Publication of *OH Today*, promoting inclusive practice and showcasing diverse career pathways.
- Delivery of confidential peer support and mentoring to assist members with challenges such as burnout, isolation, and ethical dilemmas.

Education and public health impact

- Delivery of CPD webinars, training and career guidance addressing the national shortage of OH professionals.
- Promotion of lifelong learning and interdisciplinary collaboration.
- Coverage of emerging topics including health psychology, AI and prehabilitation,

Advocacy and representation

- Active participation in national discussions on workplace health, including policy consultations and roundtables.
- Advocacy on key issues such as menopause, neurodiversity, and ageing workforces.
- Representation of the OH profession in shaping future workplace health policy.

Innovation and impact

- Expansion of digital delivery through webinars and publications.
- Establishing an AI in Occupational Health working group exploring ethical applications in practice, decision-making, and professional development.

Community building

- Delivery of regional and national networking events supporting collaboration and reducing professional isolation.
- Ongoing engagement through digital platforms and member networks.

Outcomes

- Over 1,550 members supported through CPD, mentoring, and peer support.
- Four editions of *OH Today* educational journal published, reaching a wide professional audience.
- Increased engagement across educational and networking activities.

These outcomes demonstrate the charity's continued contribution to strengthening the occupational health workforce and improving professional capability, with wider public benefit through improved practitioner knowledge, confidence and support for workplace health.

Priorities for the next reporting period

- Launch the Special Interest Group (SIG) programme to support structured professional engagement and member-led activities.
- Increase membership while maintaining accessible membership routes for students and early-career professionals.
- Introduce an impact measurement framework to improve evidence of outcomes and public benefit.
- Strengthen member communications and support arrangements, including clearer routes to peer support and wellbeing assistance.
- Continue to develop education, CPD and professional networking activities in line with the charity's purposes.

3. Financial Review

Financial performance

The trustees consider the financial performance for the year to be strong, enabling continued investment in the charity's activities despite increased operational costs. The modest surplus of £4,460 reflects planned reinvestment into member **services while maintaining prudent reserves.**

Summary	Amount
Total income	£40,700
Total expenditure	£35,210
Surplus	£6,546
Investment income	£467

Income sources

- Membership fees: £13,600
- Partner donations: £21,910
- Investment income: £467

Expenditure

- Member grants: £4,810
- External charitable support / match funding to the Council for Work and Health: £1,000.
- Educational resources (including *OH Today*): £5,433

- Events, educational resources and networking: £14,800

Reserves policy

The charity maintains reserves to ensure financial stability, manage unforeseen expenditure, and support continuity of operations in line with its financial policy.

Reserve account	Amount
Savings account	£44,964
Current account	£5,230
PayPal	£306
Stripe	£231
Total reserves	**£50,731**

Minimum reserve target: £30,000.

Going concern

The trustees have assessed the charity's financial position and confirm that no material uncertainties have been identified regarding its ability to continue as a going concern.

Principal risks and mitigation

The trustees recognise their responsibility to identify and manage the principal risks facing the charity. The summary below records both the current risk and the movement in risk during the reporting period.

Figure 1. Risk Profile and Mitigation

Risk	Description	Mitigation and in-year action	Movement this year
Financial sustainability	Dependence on membership income and donations.	Cash flow monitoring, reserves maintained in line with policy, and continued diversification through partnerships and membership growth.	Broadly stable: maintained reserves and modest surplus reduced immediate pressure, although reliance on recurring income remains a continuing risk.
Reputational and communications risk	Potential damage to credibility through inconsistent messaging, inappropriate content, or failure to meet member expectations.	Governance controls, communications review processes, code of conduct and trustee oversight of external communications.	Decreased: communications review activity strengthened oversight of external messaging, tone, consistency and approval processes.
Operational and volunteer capacity	Reliance on volunteers and key individuals, with increased pressure as activity grows.	Defined roles, succession planning, administrative support, digital tools, and monitoring capacity as activity expands.	Increased: volunteer capacity risk increased during the year due to growth in activity, increased member engagement and development of new workstreams including the SIG framework.
Data protection and IT	Data breaches or system disruption affecting member platforms and records.	GDPR compliance, controlled access, IT oversight, and continued monitoring as digital	Broadly stable: controls remain in place, with ongoing attention required as digital

		activity grows.	activity and membership engagement grow.
Compliance and governance	Regulatory non-compliance or weak governance processes.	Adherence to Charity Commission guidance, conflicts of interest management, governance review and strategic planning.	Decreased: strategic planning and governance review activity strengthened oversight, accountability and alignment with charitable purposes.

The trustees reviewed risk movement during the year and considered the principal changes to be as shown above (Figure 1). The year's actions included a communications review, strategic planning activity, and establishment of the Special Interest Group (SIG) framework. The trustees will continue to review and strengthen risk management as part of the charity's governance framework.

4. Structure, Governance and Management

Governing document

The charity is governed by a constitution and operates as a Charitable Incorporated Organisation (CIO).

Trustee appointment

Trustees are appointed by members at the Annual General Meeting. Vacancies may also be filled by the trustee board in accordance with the constitution.

Organisational structure

The charity operates through a board of trustees supported by volunteers and administrative support, enabling delivery of its objectives.

Trustee induction and training

Trustees are supported through guidance, governance discussions and access to Charity Commission resources to ensure effective performance in their roles.

5. Reference and Administrative Details

Charity name	iOH – The Association of Occupational Health and Wellbeing Professionals
Registered address	61 Waverley Road, Kenilworth, CV8 1JL

Trustees

Eleanor (Lynn) Pratt	Whole period
Janet O'Neill (Garner)	Whole period
Lucy Kenyon	Whole period
Angela Whitehead	Whole period
Elizabeth (Libby) Hassanali	5 April 2025 – 2 May 2025

Lynda Bruce	Whole period

6. Declarations

The trustees declare that they have approved this report.

Name	Eleanor (Lynn) Pratt
Position	Trustee
Signature	
Date	17 July 2026

iOH

Financial Statements
For the period ended 5th April 2026

Charity number: 1205635

iOH

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for the period ended 5th April 2026

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Report of the Trustees of iOH for the year ended 5th April 2026

Independent Examiner's report to the Trustees of iOH

I report to the Charity Trustees on my examination of the financial statements of the Charity for the year ended 5th April 2026, which are set out on pages 4 to 10.

As the Trustees of the Charity, you are responsible for the preparation of the financial statements in accordance with the requirement of The Charities Act 2011 ('the 2011 Act'). I report in respect of my examination of the Charity's financial statements carried out under section 145 of the 2011 Act and in carrying out my examination I have followed the applicable directions given by The Charities Commission under section 145(5)(b) of the 2011 Act.

Independent examiner's statement

Your attention is drawn to the fact that the Charity has prepared the accounts in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their financial statements in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102) in preference to the Accounting and Reporting by charities: Statement of Recommended Practice issued on 1 April 2005 which is referred to in the extant regulations but has been withdrawn.

I understand that this has been done in order for the financial statements to provide a true and fair view in accordance with Generally Accepted Accounting Practice effective for reporting periods beginning on or after 1 January 2019.

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:

- accounting records were not kept in respect of the Charity as required by section 130 of the 2011 Act; or that the financial statements:
- do not accord with those records; or
- do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the financial statements give a "true and fair" view which is not a matter considered as part of an independent examination.

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.

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Independent Examiner's report to the Trustees of iOH (cont.)

This report is made solely to the Charity's Trustees, as a body, in accordance with Part 4 of the Charities (Accounts and Reports) Regulations 2008. My work has been undertaken so that I might state to the Charity's Trustees those matters I am required to state to them in an Independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the Charity and the Charity's Trustees as a body, for my work or for this report.

Signed: Dated: 06.08.2026



Susan Robinson BA FCIE DChA
20 Lychfield Drive
ME2 3LY

iOH

Statement of financial activities
For the period ended 5 April 2026

	Notes	Restricted Funds	Unrestricted Funds	2026 Total	2025 Restated Total
			£	£	£
INCOME AND ENDOWMENTS					
Donations received	4	-	1,000	1,000	11,808
Subscriptions		-	13,590	13,590	15,210
Book royalties		-	73	73	406
Income including sponsorship		-	21,910	21,910	9,067
Other		-	590	590	376
Interest		-	466	466	776
Income from pre-charitable status		-	0	0	39,869
Sales			4,127	4,127	0
TOTAL INCOME		**-**	**41,756**		**77,482**
EXPENDITURE					
Charitable activities	5	-	35,210		31,307
TOTAL EXPENDITURE		**-**	**35,092**		**31,307**
NET MOVEMENT IN FUNDS		-	**6,546**		**46,175**
Total funds at beginning of year		-	46,175		-
TOTAL FUNDS AT END OF YEAR		-	**52,721**		**46,175**

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

The notes on pages 6 to 10 form part of these financial statements.

iOH

Balance sheet
As at 5th April 2026

	Notes	2026	2025 Restated
		£	£
CURRENT ASSETS			
Debtors	**8**	1,990	2,485
Cash at bank and in hand		50,731	44,003
		52,721	46,488
Creditors: amounts falling due within one year	**9**	0	313
NET CURRENT ASSETS		**52,721**	**46,175**
TOTAL NET ASSETS		**52,721**	**46,175**
FUNDS			
Unrestricted funds	**10**	52,721	46,175
Restricted funds		-	-
TOTAL FUNDS		**52,721**	**46,175**

The financial statements were approved and authorised for issue by the Trustees on August 2026 and signed on their behalf by:



1 August 2026

Eleanor (Lynn) Pratt
President

The notes on pages 6 to 10 form part of these financial statements.

iOH

Notes to the financial statements
For the period ended 5th April 2026

1. General information

iOH is Charitable Incorporate Organisation in England and Wales, number 1205635. Its registered office is 61 Waverly Road, Kenilworth, CV8 1JL. The principal objective of the Charity is to improve the health of working-age population by empowering Occupational Health professionals with the knowledge, skills and networks they need to deliver high-quality, evidence-based care. There have been no changes to the objectives of the Society during the period.

2. Accounting policies

2.1 Basis of preparation

The financial Statements have been prepared in accordance with the Charities Statement of Recommended Practice for the application of the Financial Reporting Standard to charities (FRS 102).

The financial Statements have been prepared to give a true and fair view and on a going concern basis. The Association meets the definition of a public benefit entity under FRS 102.

2.2 Going Concern

The Trustees believe the use of going concern is appropriate based on an assessment of events or conditions that might pertain over a period of at least one year from the date of authorisation for release of the Financial Statements.

2.3 Income

All income is recognised once the Charity has entitlement to the income, it is probable that the income will be received and it can be measured reliably.

No income tax is recoverable in relation to donations received under Gift Aid or deeds of covenant.

Subscriptions and sponsorship are recognised when received or invoiced.

2. Accounting policies (continued)

2.4 Expenditure

Expenditure is recognised once there is a legal or constructive obligation to a third party and the amount can be measured reliably.

2.5 Interest receivable

Interest on funds held on deposit is included when receivable and the amount can be measured reliably.

2.6 Taxation

The Charity is considered to meet the definition of a charitable company for UK corporation tax purposes as set out in Paragraph 1, Schedule 6 of the Finance Act 2010.

2.7 Debtors

Debtors are recognised at the settlement amount.

2.8 Cash at bank and in hand

Cash at bank in hand includes cash only. There are no short-term highly liquid investments.

2.9 Liabilities and provisions

Liabilities are recognised when there is an obligation at the Balance Sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement and it can be estimated reliably.

Liabilities are recognised at the amount the Charity anticipates it will pay to settle the debt.

2.10 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity and which have not been designated for other purposes.

Restricted funds are funds which are to be used in accordance with specific restrictions imposed by donors or which have been raised by the charity for particular purposes.

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Notes to the financial statements
For the period ended 5th April 2026

3. Critical accounting estimates and areas of judgement

Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. The Charity does not currently have any significant accounting estimates or areas of judgement.

4. Donations received

In 2025 the charity received £39,869 from the organisation that was in place prior to receiving charitable status.

5. Charitable activities

Charitable Activities:	2026	2025
	£	£
Grants	4,811	1,478
RAML	7,925	17,019
Website	6,875	5,433
Gifts and Subscriptions	1,715	883
IT ,internet, software	2,125	0
Donations	1,000	1,100
Running costs	10,759	5,394
Total	35,210	31,307

Nil of the above expenditure was restricted.

6. Trustees and related parties

No Trustees received any remuneration or benefits.

3 Trustees and 3 board members received reimbursed expenses totalling £868.41 (2025 £640.72) mainly in respect of train travel and refreshment costs relating to charitable activities

7. Employees

The Association has no employees.

Notes to the financial statements
For the period ended 5th April 2026

8. Debtors

	2026	2025
	£	£
Sundry Debtors	1.990	2,485
	1,990	**2,485**

The Association has claimed £0 from HM Revenue & Customs by way of Gift Aid in respect of notional tax paid on subscriptions and donations made by members during the period to 5th April 2026.

9. Creditors: amounts falling due within one year

	2026	2025
	£	
Other creditors	0	313

10. Statement of funds

	Restricted	Unrestrictrd	2026 £ Total
Balance at beginning of year	-	46,175	**46,175**
Income	-	41,756	41,756
Expenditure	-	(35,210)	(35,210)
Balance at end of year	**-**	**52,721**	**52,721**

	Restricted	Unrestricted	2025 £ Total
Balance at beginning of period	-	-	**-**
Income (restated)	-	77,482	77,482
Expenditure	-	(31,307)	(31,307)
Balance at end of period (restated)	**-**	**46,175**	**46,175**

The funds carried forward are unrestricted and are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity.
The 2025 figures are restated to include additional income received from the previous organisation
During the year the charity received £1000 from Friends educational donations the trustees designated these funds for education support. This was all spent in the year

11. Related party transactions

The Association has not entered into any related party transactions during the financial period and there are no balances outstanding with any related parties at the balance sheet date.

iOH
61 Waverley Road Kennilworth CV8 1JL
Email: admin@ioh.org.uk

Profit and loss

Account	Apr 25	May 25	Jun 25	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Total
Membership (1001004)	890	1,050	930	1,300	940	1,240	1,130	940	660	1,020	1,070	2,420	13,590
Sales (1001005)	700	950	0	0	0	0	125	0	414	414	784	740	4,127
Partnership/Donations (1001006)	6,950	950	0	2,000	0	1,050	0	4,150	0	4,910	0	1,900	21,910
Book Royalties (1001007)	0	0	0	0	0	0	0	0	0	0	0	73	73
Friends Educational Donations (1001008)	0	0	0	500	250	0	250	0	0	0	0	0	1,000
Total revenue	8,540	2,950	930	3,800	1,190	2,290	1,505	5,090	1,074	6,344	1,854	5,133	40,700
Insurance (4002003)	0	0	0	0	0	0	0	0	0	(482)	0	0	(482)
Total rent and rates	0	0	0	0	0	0	0	0	0	(482)	0	0	(482)
Internet (4003002)	0	0	0	(661)	0	0	0	0	0	0	0	0	(661)
Total communications	0	0	0	(661)	0	0	0	0	0	0	0	0	(661)
General admin (4004001)	(420)	(600)	(640)	(640)	(640)	(640)	(640)	(640)	(640)	(640)	(640)	(640)	(7,420)
Subscriptions (4004002)	0	0	0	0	0	0	0	0	0	0	0	(900)	(900)
Printing and stationery (4004003)	0	0	(78)	0	0	0	0	0	0	0	0	0	(78)
Postage and packaging (4004005)	0	0	0	(2)	0	0	0	0	0	0	0	0	(2)
Donations (4004006)	0	0	0	0	(1,000)	0	0	0	0	0	0	0	(1,000)
Website/OH Today (4004007)	0	(350)	(765)	(640)	(640)	(640)	(640)	(640)	(640)	(640)	(640)	(640)	(6,875)
RAML/NEC (4004008)	0	0	0	(534)	0	0	0	(2,496)	0	(155)	(1,588)	(3,152)	(7,925)
Grants (4004010)	(250)	0	(1,676)	0	(1,188)	0	(408)	(166)	(594)	0	(119)	(410)	(4,811)

Account	Apr 25	May 25	Jun 25	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Total
Gifts (4004011)	(350)	(50)	(31)	(23)	(100)	(62)	(66)	0	(133)	0	0	0	(815)
Software (4004013)	0	0	0	0	0	0	0	0	0	(100)	(140)	0	(240)
Total general administration	(1,020)	(1,000)	(3,191)	(1,839)	(3,568)	(1,342)	(1,754)	(3,942)	(2,007)	(1,535)	(3,126)	(5,742)	(30,066)
Travel (4005001)	0	0	0	(52)	0	0	0	0	0	0	(184)	(30)	(265)
Subsistence (4005003)	0	0	0	0	0	0	0	0	0	0	(27)	(131)	(158)
Total travel	0	0	0	(52)	0	0	0	0	0	0	(211)	(161)	(423)
Marketing (4006002)	0	0	0	0	0	0	0	0	0	0	0	(700)	(700)
Total advertising	0	0	0	0	0	0	0	0	0	0	0	(700)	(700)
Accounting fees (4007001)	0	(160)	0	(165)	0	0	0	(165)	0	(180)	0	(180)	(850)
IT Support (4007003)	(55)	(2)	(32)	(2)	(693)	(20)	(2)	(2)	(2)	(2)	(230)	(180)	(1,224)
GDRP/CCPA (4007004)	0	0	0	0	0	0	0	0	0	0	0	(118)	(118)
Total professional fees	(55)	(162)	(32)	(167)	(693)	(20)	(2)	(167)	(2)	(182)	(230)	(478)	(2,192)
Bank charges (6001002)	(66)	(43)	(47)	(71)	(48)	(53)	(53)	(49)	(30)	(58)	(64)	(104)	(687)
Total finance expense	(66)	(43)	(47)	(71)	(48)	(53)	(53)	(49)	(30)	(58)	(64)	(104)	(687)
Total expenses	(1,142)	(1,205)	(3,270)	(2,789)	(4,309)	(1,415)	(1,809)	(4,158)	(2,039)	(2,257)	(3,631)	(7,186)	(35,210)
Operating profit / loss	7,398	1,745	(2,340)	1,011	(3,119)	875	(304)	932	(965)	4,087	(1,777)	(2,053)	5,490
Other income (3001001)	60	180	350	0	0	0	0	0	0	0	0	0	590
Total other income	60	180	350	0	0	0	0	0	0	0	0	0	590
Interest income (5501001)	43	42	45	44	40	43	40	31	37	35	33	35	467
Total finance income	43	42	45	44	40	43	40	31	37	35	33	35	467
Profit / Loss	7,501	1,967	(1,945)	1,054	(3,079)	917	(265)	963	(928)	4,122	(1,744)	(2,018)	6,546