

3727119

**THE BRITISH OCCUPATIONAL HEALTH  
RESEARCH FOUNDATION**

**REPORT AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 DECEMBER 2004**

*Research will contribute towards the prevention of occupational injury and disease : healthier staff will perform better : business will benefit from improved performance, lower absenteeism and fewer compensation awards.*



A company limited by guarantee. Registered in England No. 372119  
Registered Office : 6 St Andrew Street, London EC4A 3LX  
Registered Charity No. 1077273

# THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION

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# **THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

## **LEGAL AND ADMINISTRATIVE DETAILS**

### **Organisation**

The British Occupational Health Research Foundation was incorporated as a company limited by guarantee (company number 3727119) under a Certificate of Incorporation dated 5 March 1999. It also registered with the Charity Commissioners (charity number 1077273) on 2 September 1999.

It is governed by a Board of Trustees, who are responsible for setting the strategic direction of the organisation, establishing policy and monitoring performance against agreed objectives, in accordance with the Memorandum and Articles. The Board met twice during the year, as did the Management Committee. Day-to-day operations of the organisation is delegated to the Chief Executive.

### **Objects**

The key objects of the charity are:

- To identify priorities in occupational health research and to carry out research and evidence reviews:
- To invite, receive, devise and assess research proposals and to conduct, commission, oversee, finance and assess research projects arising from such research proposals;
- To disseminate the useful results of such research and evidence reviews

### **Trustees**

The names of the Trustees, who are also directors of the company, are listed on Page 2.

The Trustees were appointed by resolutions in writing of the Trustees dated 25 May 1999 and the present Company Secretary on 24 June 2002.

### **Auditors**

Coulthards Mackenzie  
Five Kings House  
1 Queen Street Place  
London EC4R 1QS

### **Solicitors**

Speechly Bircham  
6 St Andrew Street  
London EC4A 3LX

**THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

**LEGAL AND ADMINISTRATIVE DETAILS**

**Settlor:**

Professor Sir Richard Doll CH DM FRS  
Emeritus Professor of Medicine,  
University of Oxford

**Board of Trustees:**

Mr Chris Pitt, Chairman. Director Quillion

Mrs Jackie Douglas, Director, The Colt Foundation

Surgeon Commodore J J W Sykes FRCP FFOM Royal Navy

Dr Neil Davies, Chief Medical Officer, British Energy

Dr David Murray Bruce, Consultant Occupational Health Physician

Rt Hon The Lord Hunt of Wirral MBE, Senior Partner Beachcroft Wansboroughs

Dr Noel McElearney, Director Health, Safety and Environment, Scottish & Newcastle plc

Mr Bill Callaghan, Chairman Health & Safety Commission

Dr Ali ster Scott, Group Occupational Physician, Johnson Matthey

Mr Hugh Robertson, Senior Policy Officer, Trades Union C n Congress (appointed 4 July 2004)

**Chief Executive and Company Secretary:**

Mr Brian Kazer

## THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION

### CHAIRMAN'S STATEMENT

The British Occupational Research Foundation has had a good year this year - delivering high quality high impact research and being a voice in the Occupational Health arena. The "gold standard" evidence review on occupational asthma was launched in both London and Glasgow, to great acclaim. As Bill Callaghan, Chairman of the Health and Safety Commission, said at the London launch "Speaking as a Trustee, I'm sure I speak for my fellow Trustees in saying how proud we are of this piece of work". The review report is posted on the official government websites of both the UK and the USA.

My report for the year end December 2003 said "while there have been some improvements the economy remains tough and still steeped with uncertainties. This is both a challenge and an opportunity. Although the fortunes of some organisations have improved, the pressure on costs is ever tighter". This was all too prophetic for 2004. Whilst the stock market improved, and profits of some organisations improved, this was often swiftly followed by savage cuts in the departmental budgets in some of those same organisations, 25% and even 50% in some cases. BOHRF is succeeding in getting our message heard in more and more boardrooms, that employees' health is a core business risk. Of the FTSE 100, our supporters now include BP (No. 2) in addition to Vodafone (No. 1) and GSK (No. 4), with BT seriously considering the opportunity. We have also had the message supported at Permanent Secretary level by Sir Nigel Crisp, Permanent Secretary Department of Health (DoH) and Chief Executive of the National Health Service (NHS) when he was principal guest at our April Sponsor lunch.

#### **Project Funding**

We are living in an era of greater customer choice than we have ever seen before. Responding to the market, we launched our strategy of offering project funding, and it is proving very successful. The choice is good for funders and good for our research goals. Our portfolio of high quality and high impact projects has attracted excellent levels of funding, and we are very grateful to our project funders who generously contributed £95,500 in 2004.

#### **Sponsorship**

Our Sponsor income is used to seed corn fund all our projects and is thus of enormous value to us. We were delighted to welcome back Scottish Power who became a Sponsor again, after a few years absence. BP confirmed their intention to do so in 2005, with QBE Insurance confirming their intention to become a Sponsor for the first time in 2005. We owe appreciation to both our Sponsors and our project funders whose involvement and philanthropy makes all the good work possible.

We acknowledge that we need to continue to focus on the business case for supporting BOHRF's work, including the tax breaks (which lessen the real cost of annual Sponsorship from £15,000 to £11,3000 against Corporation Tax, and reduce the real cost of project funding from £20,000 to £12,500 per year under Inland Revenue R&D scheme through charities). As promised, we have further improved payback to our Sponsors by introducing an Annual Research Day. This enables our Sponsors to listen to the emerging evidence from BOHRF funded projects directly from our current researchers. Because we only finance work of direct practical application in the workplace, this means that our Sponsors have the early opportunity to apply

During the year we have made further determined efforts to become more proactive in the research that we back. This has led directly to the development of a proposal for a major piece of research on ageing workforce, an issue of great strategic and practical significance across Western Europe.

# THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION

## CHAIRMAN'S STATEMENT

(CONTINUED)

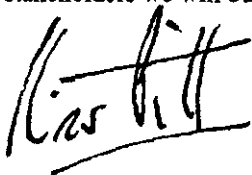
None of this could have happened without the loyalty and support of our Trustees, and employees, particularly our Chief Executive Brian Kazer.

During the year Hugh Robertson, Senior Policy Officer at the TUC, was appointed as a Trustee in succession to Owen Tudor. We welcome Hugh and look forward to working with him.

I would like to make special mention of Lord David Hunt of Wirral MBE, who has not only continued to host the Trustees Meetings in The House of Lords, giving added cohesion and purpose to the proceedings, but has also hosted congenial lunches for potential sponsors, hence making our Chief Executive's job a tad easier.

We continue to be grateful to the Faculty of Occupational Medicine (FOM) for housing BOHRF in such excellent premises and for the support of their staff and members. In particular we must mention the Faculty President, Dr W J (Bill) Gunnyeon, Professor Tony Pickering, the Chairman of its Research Committee, Dr John Harrison, the Deputy Chairman, and all the members of that Committee. Each application for a research grant is thoroughly scrutinised by the Research Committee so that both the Trustees and our sponsors can be assured that every proposal undertaken by BOHRF is based on sound science and robust methodology.

In summary, our passion for research is at the heart of everything we do and our goal is to help everyone benefit from that research. It is very encouraging that we are making significant progress persuading a number of major organisations that it makes good business sense to support our work. BOHRF has made further steps forward in a very difficult economic climate, and given the continued support of all our stakeholders we will build on this in the coming years.



JCA (Chris) Pitt  
Chairman

# THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION

## MANAGEMENT REPORT

Our continued focus on research and evidence based guidelines that have direct practical application at the workplace continues to be widely welcomed.

The application of the work that BOHRF funds makes a substantial contribution to the Government's sustainability target of reducing the number of days lost due to work related ill health by 30% by 2010. The latest report from the Health and Safety Commission shows that 33 million days are still being lost each year in UK due to work related ill health, clearly indicating that the health of employees is a core business risk. This is underlined by independent research showing that the cost to employers of absence from work is between 8 and 16% of payroll.

All the work that BOHRF funds is based on robust methodology and sound science. This is assured by the scrutiny that is given to all research applications by The Faculty of Occupational Medicine Research Committee.

We consult with our Sponsors, project funders, and with other organisations who have a genuine interest in occupational health about what grant applications they believe we should fund.

The above strategy ensures that the work we fund, and for which we ask for financial support, is:

- Aimed at controlling a core business risk
- is relevant
- and is based on robust method and latest knowledge.

As last year I am extremely grateful for the strong support of the Board of Trustees, chaired by Chris Pitt; the advice and hard work of the FOM Research Committee; the support and encouragement of so many people I have met during the course of the year; and very importantly, the researchers who carry out such valuable work using BOHRF grants wisely for the benefit of people at work, and to the organisations who host the research thus enabling it to happen.

Brian Kazer  
Chief Executive

# **THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

## **TRUSTEES' REPORT**

The Trustees present their report and accounts for the year ended 31 December 2004.

### **The Purpose of the Foundation**

The British Occupational Health Research Foundation ("BOHRF") was incorporated on 5 March 1999 and commenced operations on 1 June 1999, when it assumed all the assets and undertaking of its predecessor charity of the same name, which was originally established in 1991 to contribute to the establishment and maintenance of the highest possible degree of physical and mental well-being of employees by raising funds for occupational health research.

BOHRF's objectives remain unchanged; namely, the identification of priorities for occupational health research programmes in consultation with employers, the Health & Safety Executive, the Department of Work and Pensions, professional organisations and research institutions.

It works closely with industry and the public sector, who together are the principal source of funds and which form the community whose needs, problems and costs in terms of occupational sickness the Foundation is intended to address.

BOHRF both commissions its own research and evidence reviews and awards grants to relevant external applicants. It develops research projects which arise from the identified concerns and priorities of employers. It also provides a unique independent mechanism for employers and other organisations to combine their resources and to co-ordinate research work so as to avoid duplication and unnecessary costs. BOHRF is advised on the scientific and methodology basis of grant applications that are made to it, by the FOM Research Committee. The results of research funded by BOHRF are published so as to ensure their usefulness to as wide an audience as possible.

### **The History of BOHRF**

BOHRF's predecessor charity was established in June 1991 by Sir Richard Doll, Lord Haslam of Bolton and others, following a symposium of the country's leading occupational health professionals in the public sector,

They were concerned at the dwindling number and resources of research institutions in Britain and the lack of formal arrangements for co-ordination and co-operation in the field of occupational health research. They concluded that the establishment of a Foundation to attract funds on a large scale was practical. A joint committee was formed from members of the Faculty of Occupational Medicine, Royal College of Physicians, the Society of Occupational Medicine and the Section of Occupational Medicine, Royal Society of Medicine, to take the steps and gain the necessary support from their profession and from industry to form BOHRF. The move to the offices of the Faculty in 2001 has therefore taken BOHRF back to its roots.

### **Trustees**

The Trustees, who are also directors of the Company, were appointed under the terms of the Memorandum and Articles of Association dated 5 March 1999.

New Trustees may be appointed by invitation of the Board.



# THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION

## TRUSTEES' REPORT

### (CONTINUED)

#### **Sponsors and the Funding of Research**

A key element of BOHRF's strategy is to identify the needs of employers in general, and of Sponsors in particular, and to commission research which is relevant, practical and usable to the benefit of both employers and employees.

Sponsorship is sought from major employers in the UK with an aim of ensuring that as many sectors of industrial, commercial activity and public sector employment as possible are represented.

Sponsors are asked to make a commitment to contribute £15,000 per annum over 4 years: this ensures that the Foundation is able to commission the required research, which normally has a life of three to four years. Sponsorship can be offset against tax. Sponsor donations seedcorn fund all the research and evidence reviews funded by BOHRF. A new benefit introduced in 2002 is to provide Sponsors with early full copy of final report of all projects started during their period of sponsorship.

BOHRF's strategy has been to build a reliable core income to enable it to function effectively, plan ahead (vital when typical research programmes last three to four years) and act as a co-ordinator of funds and projects and a catalyst between donors and researchers.

Its general fund can finance some small to medium size studies: larger studies and major projects will be financed individually by project funding.

Project funding enables donors to identify work of real interest to them and makes a larger pool of money available for research. It provides a medium for partnership and the pooling of resources, data and experience. Project funders in the private sector enjoy a tax break of 125% which is available under IR R & D tax credit scheme. We also seek sponsorship of deliverables resulting from evidence reviews, and of workshops/conferences to launch the results of our work.

We are extremely grateful to the Faculty of Occupational Medicine for their continued support. In particular we are very grateful to its Research Committee, chaired by Professor Tony Pickering. That Committee, *inter alia*, advises BOHRF on the robustness and scientific validity of grant applications that are made to BOHRF. We are housed in the Faculty offices, whilst remaining fully independent.

#### **Review of the Year ended 31 December 2004**

2004 was a successful year for BOHRF. The "gold standard" systematic review "Guidelines for the prevention, identification and management of occupational asthma: evidence review and recommendations" was launched to great acclaim, with a launch in London at the Royal College of General Practitioners, and a full day conference hosted by The Scottish Executive at the Royal College of Physicians and Surgeons, in Glasgow. The evidence report is posted on the official government websites of both UK and the USA. Summaries of evidence were produced for GPs and practice based nurses, with copies distributed by the Local Medical Committees in the UK. Subsequently the "read codes" for GPs have been modified to incorporate occupational asthma, a breakthrough in enabling the cycle of cases to be broken at the optimum point to prevent the disease becoming severe.

# THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION

## TRUSTEES' REPORT

(CONTINUED)

### **Review of the Year ended 31 December 2004 (Continued)**

Our first proactive project, another "gold standard" systematic evidence review (to Cochrane standard), was started. This time on "Mild and Moderate Mental Ill Health". This has attracted attention from the Minister. It is scheduled to launch in September 2005.

We held our first Research Day, at which our sponsors had the opportunity to discuss the emerging findings of research being funded by BOHRF. A typical response from our Sponsors was "a day very well spent". This was combined with a Sponsor lunch at the House of Lords, hosted by The Rt Hon the Lord Hunt of Wirral MBE. Sir Nigel Crisp, Chief Executive of the NHS, was our principal guest, and "rehabilitation" was the theme. The lunch was oversubscribed.

A total of £52,868 was agreed in grant applications. The Business Plan adopted by the Board at its November meeting identifies how we can achieve an increased "grip" on a proactive agenda for research and evidence reviews, whilst at the same time receiving grant applications from researchers in universities and elsewhere. We have further developed our approach to identifying proactive issues, and for meeting stakeholders.

We welcomed back Scottish Power as a Sponsor, and BP confirmed their intention to become a Sponsor again. QBE Insurance confirmed their intention to become a Sponsor for the first time.

Corporate Social Responsibility agenda of larger organizations has not always been the opportunity that it might seem for occupational health. However, during 2004 we were pleased to be asked to meet Business in the Community (the leading NGO in CSR issues), and contributed to their first Research report on occupational health. This is another breakthrough.

Our income excludes funding in kind. This is the provision of a Scientific Secretary by HSE for the occupational asthma project, and also the time of members of the research working groups on the two evidence reviews. In total this amounts to an estimated £280,000. Costs have continued to be a focus of attention. Last year we achieved our best ever ratio between fixed costs and income at 30% (this including full management costs associated with projects). This year we have matched that ratio. The proportion of our income spent on administration was just 3%.

### **Risk Statement**

The Trustees have introduced a formal risk management process to assess business risks and implement risk management strategies. This has involved identifying the types of risks that the Foundation faces, prioritising them in terms of potential impact and likelihood of occurrence, and identifying means of mitigating the risks. The initial risk management review was completed by the Trustees in November 2002, and is reviewed annually together with the effectiveness of the controls designed to mitigate the risks. Any serious risks emerging at an interim date will be dealt with appropriately at the time.

# THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION

## TRUSTEES' REPORT

(CONTINUED)

### Funding Policy

BOHRF funds research in occupational health which is of practical value, and is based on robust science and methodology; together with reviews of evidence and evidence-based Guidelines. We do not fund individuals. Contractors must be well established academic or research organisations. We do not fund indirect costs and overheads with the exception of pro-rata superannuation and NIC for the lead researcher.

BOHRF continues to seek funding from Corporate Sponsors, to provide phase I funding to establish methodology or the scale of a problem for phased Projects, to seed-fund Projects of particular strategic significance, to contribute to projects generally, and to cover fixed overheads.

Project funding has been introduced as a second income stream. Project funders donate funds restricted to a specified project. Cash received is deposited in a separate bank account specifically for restricted funds, and each donation is referenced with the project number.

### Investment Policy

The Trustees have reviewed the level of cash balances currently held in interest bearing bank accounts to see whether it might be preferable to place funds, not likely to be required in the foreseeable future, into longer term investments. They have agreed that, with the present uncertainty in the financial markets, no changes should be made at present. This will be kept under review.

### Reserves Policy

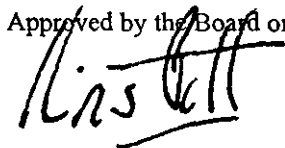
Charity Commission guidance defines free reserves as "income which becomes available to the charity and is to be expended at the Trustees' discretion in furtherance of the Charity's objectives, but is not yet spent, committed or designated".

The Trustees have considered the level of reserves needed, taking into account the fact that full provision has been made for all research contracts entered into and being of the opinion that no further funds are required to be put aside in respect of these contracts. In the short term the charity only needs to cover administrative and staff costs. The Trustees consider that 50% of fixed operating costs is appropriate as a Reserves Policy.

### Auditors

Coulthards Mackenzie are eligible to be retained as auditors, and a resolution to that effect will be made at the AGM.

Approved by the Board on 9 June 2005 and signed on its behalf by:



J C A (Chris) Pitt  
Chairman

# Appendix 1

## COMPLETED RESEARCH AND EVIDENCE REVIEWS FUNDED BY BOHRF

### Funding provided and key outcomes

Research/Evidence Review	Grant	Year	Key Findings
Low Back Pain Evidence Review	£40,000	1999	<p>This evidence review on the main cause of absence from work and its summary fundamentally shifted thinking on management of employees with low back pain. Organisations who implemented its findings reported savings of £24,000 per case.</p> <ul style="list-style-type: none"> <li>• For someone suffering back pain mostly keep active and at work (possibly with help). Do not rest unless specifically instructed</li> <li>• For those off work, visit early and offer help at work to start working again</li> <li>• For someone off work over four weeks, seek a rehab programme +/- physio</li> <li>• No effective method to predict who might get back pain</li> <li>• No evidence that lumbar supports reduce MSD risk</li> </ul>
Occupational asthma evidence review	£38,778	2003	<p>First global systematic evidence review identification and management of occupational asthma (the largest cause of occupational respiratory disease in industrialised countries, with 7,000 new cases p.a. in UK)</p> <ul style="list-style-type: none"> <li>• Employees with rhinitis and in "at risk jobs" have greatest risk of developing occupational asthma in first two years of "at risk work"</li> <li>• Referral of such workers for 4 times daily peak flow health surveillance for three weeks is likely to confirm diagnosis in about 50% of those with rhinitis. The occ asthma can be cured at this stage</li> <li>• Previous history of asthma is not a reason for excluding workers from "at risk" jobs. They should have more frequent peak flow tests</li> </ul>
Reducing Stress and Improving Productivity Through Work Reorganisation Goldsmiths College, University of London Dr Frank Bond and Dr David Bunce	£48,493	2002	<ul style="list-style-type: none"> <li>• First case control research to prove increase in job control for workers who previously had no "say" in this reduces sickness absence; increases motivation; results in substantial cost benefit</li> <li>• showed this can be reproduced in different groups of workers</li> </ul>

Hand Arm Vibration Syndrome Evidence Review Health & Safety Laboratories, Sheffield Dr Howard Mason	£50,450 + £40,000 each EEF + FOM	2003	<ul style="list-style-type: none"> <li>• Health surveillance crucial for workers at risk (continued/...)</li> <li>• No "safe" level of vibration</li> <li>• Greater the grip, greater the risk</li> <li>• Workers with pre-existing damage to nerves or blood supply to hands should not be exposed to hand transmitted vibration</li> <li>• Stage 3 HAVS? Remove worker from exposure</li> <li>• Stage 2 HAVS? Allow to continue only if no alternative work and exposure reduced</li> </ul>
Managing Attendance at Work Evidence Review University of Birmingham Dr Anne Spurgeon	£10,397	2002	<ul style="list-style-type: none"> <li>• current best practice is not evidence based</li> <li>• early regular contact with absent people works on getting them back</li> <li>• best effects are with high absence people</li> <li>• detailed monitoring statistics are vital</li> <li>• objectives of managing attendance at work programmes need to be clear and transparent</li> </ul>
Review on Prevalence etc of Mental Ill-Health at Work The Institute for Employment Studies Dr Jo Rick, S. Perryman, Jim Hillage	£19,960	1998	<ul style="list-style-type: none"> <li>• identified prevalence of mental ill health in working population</li> <li>• proportion of cases receiving or warranting treatment</li> <li>• impact of mental illness on sickness absence and ill-health retirement</li> </ul>
Mental Health in the Workplace: Literature Review University of Birmingham Dr Tim Carter	£7,130	1998	<ul style="list-style-type: none"> <li>• identification of factors which determine prevalence of mental ill health in the working population</li> </ul>
Destructive Interpersonal Conflict and the Role of Management of Manchester School Management Professor Cary Cooper and Mr Helge Hoel	£85,664	1998	<ul style="list-style-type: none"> <li>• established prevalence and scale of bullying at work</li> <li>• got "bullying at work" on the agenda in those sectors where it was found to be a significant issue</li> <li>• led to inclusion of "bullying" into HR/diversity/ equality etc agenda where relevant</li> </ul>
Studies on the Role of the Macrophage in Ultrafine Particle	£39,135	1997	<ul style="list-style-type: none"> <li>• demonstrated the health effects of exposure to ultra-fine particles related to size</li> </ul>

Mediated Lung Injury Napier University, Edinburgh Professor Ken Donaldson			<ul style="list-style-type: none"> <li>opened up debate/study on ultrafines and the possibility that exposure standards for dusts are set much too high (continued/...)</li> <li>led to investigation of possible cause of ill health in welders</li> </ul>
RSI Patients and Keyboard Workers Sensory and Autonomic Function University College, London Dr Lynn Bruce	£14,754 (+ £42,800 HSE)	1997	<ul style="list-style-type: none"> <li>development of a screening tool for at-risk workers</li> <li>ultrasound imaging as a diagnostic real time tool for investigating non-specific arm pain</li> <li>video to show median nerve movements to keyboard workers as part of training in encouraging change of activity periods</li> </ul>
The Neurotoxicity of Paint Solvents University of Aberdeen Professor Tony Seaton	£68,696	1997	<ul style="list-style-type: none"> <li>substantial contribution to case for developing water based and solvent-free paints to reduce neurological effects both in producers and users</li> </ul>
The Role and interaction of Occupational Risk factors and Generalised Susceptibility to Osteoarthritis of the Knee: a case control investigation University of Nottingham Dr Ken Muir et al	£65,052	1997	<ul style="list-style-type: none"> <li>prolonged or repeated knee bending is a risk factor in knee osteoarthritis</li> <li>risk of OA with regular heavy lifting</li> <li>risk is higher in jobs entailing bending and heavy lifting</li> </ul>
A Longitudinal Study of an Occupational Cohort: Predicting Future Musculoskeletal Disease Skin Care Campaign Questionnaire Leicester University	£71,344	1996	<ul style="list-style-type: none"> <li>improvement of case management of conditions that often end in early retirement and are associated with large claims</li> </ul>
Survey of Occupational Health Priorities University of Birmingham Professor Malcolm Harrington	£1,500		<ul style="list-style-type: none"> <li>questionnaire for use by the skin care campaign</li> </ul>
Skin Barrier Impairment in Irritant Contact Dermatitis University College, Wales		1995	<ul style="list-style-type: none"> <li>a Delphi study of published literature in occupational health to determine rank order priorities for future research</li> </ul>
	£52,890	1994	This and earlier studies funded by BOHRF have been archived. Searches have to date failed to find them.

Isocyanate Asthma University of Southampton	£30,000	1994	
Studies on the Early Subcellular Changes Induced in Human Skin by Chemical Irritants and the Subsequent Release of Inflammatory Mediators Erasmus Dermatological Research Fund Wilson		1993	
Study of Workers Exposed to Poly Aromatic Hydrocarbons University of Newcastle		1993	
Vibration White Finger Syndrome Royal Post Graduate Medical School Hammersmith			
Exposure to Mineral Acid Mists University of Southampton Professor David Coggon			A cohort study on the health of workers exposed to mineral acid mists at work

## Appendix 2

### BOHRF CURRENT PROJECTS 2005

#### Key Objectives and Relevance

Project	Grant	Key Objectives	Employment Sectors to which Relevant
Mild and moderate mental ill health: evidence review (Chairman: Dr Kit Harling, Director NHS Plus)	£89,385	<p>Provision of evidence based report from a worldwide literature search and critical appraisal of the evidence; with summaries for (a) HR and line managers (b) occupational health professionals on</p> <p>"stress" (mild and moderate mental ill health); covering</p> <ul style="list-style-type: none"> <li>• What works on people with anxiety, unhappiness etc staying in work</li> <li>• What works on getting people off work with anxiety, depression etc back to work and staying in work productively</li> <li>• Early retirement issues</li> <li>• What works regarding change management and absence management</li> </ul>	Relevant to all employment sectors and the number one occupational health issue in UK, western Europe, and North America.



		Will enable them to work from a basis of evidence for the first time.	
<p>Ageing Workers: Evidence Based guidelines for Physical and Mental Functionality/Fitness/Performance</p> <p>The Oxford Institute of Ageing</p> <p>Dr Sarah Harper et al</p>	£173,134	<p>Strategically a key issue due to demographics + forthcoming age discrimination legislation.</p> <p>Practical (cont)</p> <p>Validated transferable evidence base for</p> <ul style="list-style-type: none"> <li>• Can ageing workers perform and be productive effectively</li> <li>• How does the employer know if they are fit and able to perform physically and mentally</li> <li>• Is health screening needed. If so, when</li> <li>• How does employer cope with retaining older workers having core competencies</li> <li>• What if the worker wants to continue past expected retirement</li> </ul>	<p>All sectors in western Europe, Asia and Latin America (evidence to be validated in two employment sectors (a) high risk for physical ability and mental cognitive ability (b) plus in either female health care or manufacturing)</p>
<p>Evaluating management strategies for workplace trauma</p> <p>The Institute for Employment Studies</p>	£108,775	<ul style="list-style-type: none"> <li>• Effect of manager debriefs</li> <li>• Effect of referrals for critical incident debriefing</li> <li>• Who opts for debriefs and</li> </ul>	<p>The first study to do this</p> <ul style="list-style-type: none"> <li>• In workplace</li> <li>• Including</li> </ul>

Dr Jo Rick et al		why	witnesses Relevant to all sectors with vulnerable to traumatic events e.g. occupational drivers; NHS staff; postal workers; police; fire authorities; security companies etc
Destructive Interpersonal Conflict in the Workplace: Effectiveness of Management Interventions Manchester Business School Dr Helge Hoel et al	£99,276	<ul style="list-style-type: none"> <li>• Development of risk assessment toolkit on bullying at work</li> <li>• Policy review and changes</li> <li>• Effectiveness of training on reducing stress thus bullying behaviour</li> <li>• Effectiveness of other organisation specific interventions</li> </ul>	Relevant to all sectors identified as high prevalence in phase 1. mainly public sector <ul style="list-style-type: none"> <li>• Prison service</li> <li>• Police</li> <li>• Teaching</li> <li>• Civil service</li> <li>• Local authorities</li> <li>• NHS</li> <li>• banking</li> </ul>
Detergent enzyme sensitisation and asthma at work: exposure-response relationships Imperial College London Dr Paul Cullinan et al	£20,592	<ul style="list-style-type: none"> <li>• measure extent of success of control programme after major outbreak of occupational asthma and sensitisation</li> <li>• dose response relationship between exposure to</li> </ul>	<ul style="list-style-type: none"> <li>• organisations where employees are exposed to allergens</li> </ul>

		<p>allergens and onset of occ asthma</p> <ul style="list-style-type: none"> <li>• explore reasons for failure of original control e.g. issues re batch processing</li> </ul>	
<p>Ageing, Work and Health: An Investigation of Working Womens' Experience of the Menopause University of Nottingham Professor Amanda Griffiths et al</p>	<p>£43,062</p>	<ul style="list-style-type: none"> <li>• the extent and nature of the problems that the menopause presents for women at work</li> <li>• which characteristics of the work environment present particular challenges for menopausal women</li> <li>• which characteristics of work enable women to progress through this transition with relative ease</li> <li>• suggestions for best practice</li> </ul>	<ul style="list-style-type: none"> <li>• two thirds of UK women between 50 and 59 are in paid employment</li> </ul>

## THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION

### STATEMENT OF TRUSTEES' RESPONSIBILITIES

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 charitable company at the end of the financial year and of the surplus or deficit of the charitable company for that period. In preparing those financial statements the

- Select suitable accounting policies and then apply them consistently;
- Make judgements and estimates that are reasonable and prudent;
- Prepare the financial statements on a going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The Trustees are responsible for keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the charitable company and to enable them to ensure that the financial statements comply with the Companies Act 1985. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The Trustees are responsible for ensuring that the Trustees Report and other information included in the annual report is prepared in accordance with company law in the United Kingdom.

**INDEPENDENT AUDITORS' REPORT TO THE TRUSTEES OF  
THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

We have audited the financial statements of The British Occupational Health Research Foundation for the year ended 31 December 2004 which comprise the Statement of Financial Activities, the Balance Sheet and the related notes. These financial statements have been prepared under the accounting policies set out therein.

This report is made solely to the charitable company's members, as a body, in accordance with Section 235 of the Companies Act 1985. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.

**Respective Responsibilities of Directors and Auditors**

The responsibilities of the trustees (who are also the directors of The British Occupational Health Research Foundation for the purposes of company law) for preparing the Annual Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards are set out in the Statement of Trustees' Responsibilities.

Our responsibility is to audit the financial statements in accordance with relevant legal and regulatory requirements and United Kingdom Auditing Standards.

We report to you our opinion as to whether the financial statements give a true and fair view and are properly prepared in accordance with the Companies Act 1985. We also report to you if, in our opinion, the Trustees' Report is not consistent with the financial statements, if the charitable company has not kept proper accounting records, if we have not received all the information and explanations we require for our audit, or if information specified by law regarding trustees' remuneration and transactions with the charitable company is not disclosed.

We read the Trustees' Report and consider the implications for our report if we become aware of any apparent misstatements within it.

**Basis of Audit Opinion**

We conducted our audit in accordance with United Kingdom Auditing Standards issued by the Auditing Practices Board. An audit includes examination, on a test basis, of evidence relevant to the amounts and disclosures in the financial statements. It also includes an assessment of the significant estimates and judgements made by the trustees in the preparation of the financial statements, and of whether the accounting policies are appropriate to the charitable company's circumstances, consistently applied and adequately disclosed.

We planned and performed our audit so as to obtain all the information and explanations which we considered necessary in order to provide us with sufficient evidence to give reasonable assurance that the financial statements are free from material misstatement, whether caused by fraud or other irregularity or error. In forming our opinion we also evaluated the overall adequacy of the presentation of information in the financial statements.

**Opinion**

In our opinion the financial statements give a true and fair view of the state of the charitable company's affairs as at 31 December 2004 and of its incoming resources and application of resources, including its income and expenditure, in the period then ended and have been properly prepared in accordance with the Companies Act 1985.

*Coulthards Mackenzie*  
Coulthards Mackenzie  
Chartered Accountants  
Registered Auditors

Five Kings House  
1 Queen Street Place  
London EC4R 1QS

*9 June 2005*

**THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

**STATEMENT OF FINANCIAL ACTIVITIES  
FOR THE YEAR ENDED 31 DECEMBER 2004  
(INCORPORATING AN INCOME AND EXPENDITURE ACCOUNT)**

	Notes	Restricted Funds £	Unrestricted Funds £	2004 Total Funds £	2003 Total Funds £
<b>Incoming Resources</b>					
Donations and Similar Income	2	101,421	95,500	196,921	221,072
Investment Income		6,595	9,996	16,591	12,843
<b>Total Incoming Resources</b>		<u>108,016</u>	<u>105,496</u>	<u>213,512</u>	<u>233,915</u>
<b>Resources Expended</b>					
<b>Costs of Generating Funds</b>					
Fundraising	3	-	14,881	14,881	37,742
<b>Charitable Expenditure</b>					
Grants Payable	4	945	43,063	44,008	128,358
Support Costs	5	-	12,080	12,080	23,016
Publicity	6	-	3,534	3,534	2,159
Management and Administration	7	-	6,446	6,446	6,790
Project Management	8	9,439	18,962	28,401	-
<b>Total Resources Expended</b>		<u>10,384</u>	<u>98,966</u>	<u>109,350</u>	<u>198,065</u>
<b>Net Incoming Resources</b>		97,632	6,530	104,162	35,850
Fund Balance Brought Forward at 1 January 2004		-	82,333	82,333	46,483
Transfer Between Funds	9	<u>(97,632)</u>	<u>97,632</u>	<u>-</u>	<u>-</u>
<b>Fund Balances Carried Forward at 31 December 2004</b>		<u>-</u>	<u>£186,495</u>	<u>£ 186,495</u>	<u>£ 82,333</u>

**Continuing Operations**

All of the charitable company's activities in the above two financial years derived from continuing operations.

**Total Recognised Gains and Losses**

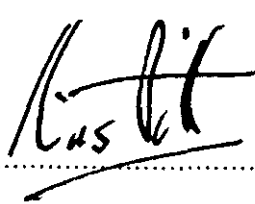
The charitable company has no recognised gains or losses other than the profit for the above two financial years.

**THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

**BALANCE SHEET AS AT 31 DECEMBER 2004**

	Notes	2004		2003	
		£	£	£	£
<b>Fixed Assets</b>					
Tangible Fixed Assets	12		-		-
<b>Current Assets</b>					
Debtors	13	10,745		235	
Cash at Bank and In Hand		465,932		533,897	
		<u>476,677</u>		<u>534,132</u>	
<b>Creditors:</b>					
Amounts Falling Due Within					
One Year	14	<u>(290,182)</u>		<u>(451,799)</u>	
<b>Net Current Assets</b>			186,495		82,333
<b>Net Assets</b>			<u>£ 186,495</u>		<u>£ 82,333</u>
<b>Funds</b>					
Unrestricted Funds	15		186,495		82,333
Restricted Funds	15		-		-
			<u>£ 186,495</u>		<u>£ 82,333</u>

Approved by the Board on 9 June 2005  
and signed on its behalf by

J C A (Chris) Pitt:  ..... Chairman

**THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**  
**NOTES TO THE ACCOUNTS**  
**FOR THE YEAR ENDED 31 DECEMBER 2004**

**1) Accounting Policies**

**a) Accounting Convention**

The financial statements are prepared under the historical cost convention, with the exception of investments which are included at market value. The financial statements have been prepared in accordance with the Statement of Recommended Practice, Accounting and Reporting by Charities (SORP 2000) issued in October 2000, SORP Update Bulletin 1 issued in December 2002, applicable accounting standards and the Companies Act 1985.

**b) Income**

Donated income is in the form of general and restricted grants from a number of companies, and is accounted for on an accruals basis where notification has been given and legal formalities completed prior to the balance sheet date. For donations received under deed of covenant or the Gift Aid Scheme, the amount is grossed up for the tax recoverable. The tax is shown as a debtor until it is recovered.

Bank deposit income is accounted for on an accruals basis.

**c) Tangible Fixed Assets**

All assets costing more than £100 are capitalised.

Depreciation is provided on the costs of computer equipment and office furniture in equal annual instalments over the estimated lives of the assets at a rate of 20% per annum on a straight line basis. A full year's depreciation is charged in the year of acquisition.

**d) Resources Expended**

Expenditure is accounted for on an accruals basis.

Expenditure is allocated between costs of generating funds and charitable expenditure by allocating costs on a fair basis, based on a specific review of the expenditure incurred.

Administration expenditure includes all expenditure not directly related to the charitable activity or fundraising ventures. This includes costs of renting and running office premises, staff salaries for administrative staff and audit fees. Fundraising expenditure comprises costs incurred in inducing organisations to contribute financially to the charity's work. This includes advertising and the staging of fundraising activity. Support costs comprise costs for research project management, and processing grants and applications. Salary costs have been allocated on the basis of the amount of time engaged in each area of activity.

**e) Grants**

Research grants are made in accordance with the charitable company's Memorandum and Articles of Association and are subject to approval by the Trustees. Grants are charged in full in the Statement of Financial Activities in the year in which the commitment is entered into. Grants payable are charged in the year when the offer is conveyed to the recipient except in those case where the offer is conditional, such grants being recognised as expenditure when the conditions are fulfilled.



# THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION

## NOTES TO THE ACCOUNTS FOR THE YEAR ENDED 31 DECEMBER 2004 (CONTINUED)

### 1) Accounting Policies (Continued)

#### f) Funds

General Funds are unrestricted funds held for the general objects of the Foundation's work. Restricted Funds are funds used for specific purposes laid down by the donor. Expenditure which meets this criterion is identified to the specific fund.

#### g) Operating Leases

Rents payable under operating leases are charged to the Statement of Financial Activities over the term of the lease.

### 2) Donations and Similar Income

	Restricted £	Unrestricted £	2004 £	2003 £
Corporate Supporters and Sponsorship				
AMEC	-	15,000	15,000	15,000
Carillion	-	15,000	15,000	15,000
The Colt Foundation	-	-	-	15,000
Diageo	-	-	-	2,500
DoH (NHS Executive)	-	-	-	10,000
D.W.P	20,000	-	20,000	-
Electricity Association	-	-	-	20,000
Exxon Mobil	6,000	-	6,000	-
GKN	-	1,000	1,000	1,000
GSK	5,000	-	5,000	-
HSE	20,000	-	20,000	35,000
Institute of Petroleum	-	-	-	10,000
IOSH	-	15,000	15,000	15,000
Ministry of Defence	-	15,000	15,000	15,000
MMDUS	-	-	-	5,000
Pfizer	5,000	-	5,000	-
Rexam	-	12,500	12,500	12,500
R.H.M.	10,000	-	10,000	-
RollsRoyce	-	-	-	5,000
The Royal Mail Group	-	10,000	10,000	10,000
Scottish & Newcastle	-	-	-	15,000
Scottish Power	-	12,000	12,000	-
Transco	-	-	-	20,000
Unilever	10,000	-	10,000	-
Vodafone	25,421	-	25,421	-
Anonymous Donation	-	-	-	72
	<u>101,421</u>	<u>95,500</u>	<u>196,921</u>	<u>221,072</u>

**THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

**NOTES TO THE ACCOUNTS  
FOR THE YEAR ENDED 31 DECEMBER 2004  
(CONTINUED)**

<b>3) Cost of Generating Funds</b>	<b>2004</b>	<b>2003</b>
	<b>£</b>	<b>£</b>
Salaries	10,800	24,448
Faculty of Occupational Medicine	2,410	11,278
Sponsor Lunches	1,585	1,337
Miscellaneous	86	679
	<u>14,881</u>	<u>37,742</u>
 <b>4) Grants Payable</b>	 <b>2004</b>	 <b>2003</b>
	<b>£</b>	<b>£</b>
The Amount of Institutional Grants Payable in the Year Comprises: Research into Occupational Health		
Univ of Newcastle 145E01	-	5,000
Faculty of Occupational Medicine 154E02	-	5,000
BOHRF 169E03	-	38,778
BOHRF 182E03	9,805	79,580
BOHRF 199E04	43,063	
Grants Subsequently Not Taken Up		
- BOHRF 154E02	(8,860)	-
	<u>44,008</u>	<u>128,358</u>
 <b>Reconciliation of Grants Payable:</b>		
Commitments Brought Forward	358,056	329,552
Commitments Made in the Year	44,008	128,358
Grants Paid in the Year	(140,596)	(99,854)
Commitments at 31 December 2004	<u>261,468</u>	<u>358,056</u>

**THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

**NOTES TO THE ACCOUNTS  
FOR THE YEAR ENDED 31 DECEMBER 2004  
(CONTINUED)**

<b>5) Support Costs</b>	<b>2004</b>	<b>2003</b>
	<b>£</b>	<b>£</b>
Salaries	5,319	16,003
Faculty of Occupational Medicine	6,385	6,642
Miscellaneous	376	371
	<u>12,080</u>	<u>23,016</u>
<b>6) Publicity</b>	<b>2004</b>	<b>2003</b>
	<b>£</b>	<b>£</b>
Web-Site Management and Updates/Re-Design	2,160	277
E-mail Host	-	705
Advertising	1,352	18
Printing	22	796
Miscellaneous	-	363
	<u>3,534</u>	<u>2,159</u>
<b>7) Management and Administration</b>	<b>2004</b>	<b>2003</b>
	<b>£</b>	<b>£</b>
Salaries	4,045	4,001
Audit and Accountancy	1,981	1,392
Insurance	420	302
Payments Under Operating Leases	-	548
Miscellaneous	-	547
	<u>6,446</u>	<u>6,790</u>
<b>8) Project Management</b>	<b>2004</b>	<b>2003</b>
	<b>£</b>	<b>£</b>
Salaries	23,552	-
Faculty of Operational Medicine	4,820	-
Miscellaneous	29	-
	<u>28,401</u>	<u>-</u>

**THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

**NOTES TO THE ACCOUNTS  
FOR THE YEAR ENDED 31 DECEMBER 2004  
(CONTINUED)**

**9) Transfer Between Funds**

The charity from time to time makes unconditional grant commitments from the Unrestricted Fund which are subsequently funded, in whole or in part, by donations which are restricted under their terms to be applied towards particular research projects. A transfer is therefore required to match the donations received as restricted fund income against the grant commitment expenditure previously charged as unrestricted fund expenditure.

**10) Emoluments of Employees**

The average number of employees during the year was one (2003 : one). No employee received remuneration amounting to more than £50,000 in either year.

	<b>2004</b>	<b>2003</b>
	<b>£</b>	<b>£</b>
Salaries	41,143	40,000
Employers National Insurance	4,733	4,452
	<u>45,876</u>	<u>44,452</u>

**11) Expenses Payments to Trustees**

Expenses incurred by Trustees during the year amounting to £23 (2003 : £151) were reimbursed. Trustees do not receive any remuneration for time and services provided.

**12) Tangible Fixed Assets**

	<b>Computer Equipment £</b>	<b>Office Furniture and Equipment £</b>	<b>Total £</b>
<b>Cost</b>			
At 1 January 2004 and 31 December 2004	<u>300</u>	<u>3,106</u>	<u>3,406</u>
<b>Accumulated Depreciation</b>			
At 1 January 2004 and 31 December 2004	<u>300</u>	<u>3,106</u>	<u>3,406</u>
<b>Net Book Value</b>			
At 31 December 2004	<u>-</u>	<u>-</u>	<u>-</u>
At 31 December 2003	<u>-</u>	<u>-</u>	<u>-</u>

**THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

**NOTES TO THE ACCOUNTS  
FOR THE YEAR ENDED 31 DECEMBER 2004  
(CONTINUED)**

<b>13) Debtors</b>	<b>2004</b>	<b>2003</b>
	<b>£</b>	<b>£</b>
Prepayments	745	235
Other Debtor	10,000	-
	<u>10,745</u>	<u>235</u>

<b>14) Creditors: Amounts Falling Due Within One Year</b>	<b>2004</b>	<b>2003</b>
	<b>£</b>	<b>£</b>
Research Grant Commitments	261,468	358,056
Accruals	8,714	23,322
Grant Pending Repayment	-	25,421
Resources Held for a Third Party	20,000	45,000
	<u>290,182</u>	<u>451,799</u>

<b>15) Analysis of Net Assets Between Funds</b>	<b>Unrestricted Funds</b>	<b>Restricted Funds</b>	<b>Third Party Funds</b>	<b>Total Funds</b>
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Tangible Fixed Assets	-	-	-	-
Cash at Bank	316,950	128,982	20,000	465,932
Other Current Assets	10,745	-	-	10,745
Grant Commitments	(132,486)	(128,982)	-	(261,468)
Other Current Liabilities	(8,714)	-	(20,000)	(28,714)
<b>Net Assets at</b>	<u>186,495</u>	<u>-</u>	<u>-</u>	<u>186,495</u>
<b>31 December 2004</b>	<u>186,495</u>	<u>-</u>	<u>-</u>	<u>186,495</u>

**16) Operating Lease Commitments**

The Foundation had an annual commitment in respect of an operating lease for office equipment as follows:

	<b>2004</b>	<b>2003</b>
	<b>£</b>	<b>£</b>
Lease which:		
Expires in the Next Year	-	548
	<u>-</u>	<u>548</u>

**THE BRITISH OCCUPATIONAL HEALTH RESEARCH FOUNDATION**

**NOTES TO THE ACCOUNTS  
FOR THE YEAR ENDED 31 DECEMBER 2004  
(CONTINUED)**

**17) Control**

The control of the Foundation is in the hands of the Trustees.

**18) Connected Charity**

The Foundation is an independent registered charity responsible for its own administration and financial management. It enjoys a close working relationship and professional ties with the Faculty of Occupational Medicine which provided premises and certain administrative services in return for a charge. The charge for 2004 was £13,615 (2003 : £17,920).