



OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

Charity Registration Number: 1168722

Company Registration Number: 07029077

**REPORT OF THE TRUSTEES AND FINANCIAL STATEMENTS
FOR THE PERIOD ENDED 30 SEPTEMBER 2020**

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REFERENCE AND ADMINISTRATIVE DETAILS OF THE CHARITY, ITS TRUSTEES AND ITS ADVISERS FOR THE PERIOD ENDED 30 SEPTEMBER 2020

Trustees

The following persons served as Trustees during the period to the acceptance of this report:

| | |
|-----------------------------------|--------------------------------|
| Ms Chris Laszcz-Davis | Co-Chair |
| Mrs Nancy Manning McClellan | Co-Chair, resigned 20 May 2020 |
| Mr Steven Angele Maurits Verpaele | Co-Chair |
| Mr Alan Leibowitz | Honorary Treasurer |
| Dr Rosario Di Corleto | |
| Dr Thomas P Fuller | IOHA Representative |
| Mr Peter-John Jacobs | Appointed 9 June 2020 |
| Ms Ruth Jimenez Saavedra | |
| Dr Seymour Zachary Mansdorf | |
| Mr David O'Malley | Resigned 20 May 2020 |
| Ms Lynn O'Donnell | |
| Mrs Lucetta Jane Weaver | |
| Dr David Zalk | Appointed 9 June 2020 |

Company registration number 07029077

Charity registration number 1168722

Registered office Unit 5-6
Melbourne Business Court
Millennium Way
Pride Park
Derby
DE24 8LZ

Website www.ohlearning.com

Advisers to the Trustees Mr Roger Alesbury
Mrs Nancy Manning McClellan
Mr David O'Malley
Mr Noel Tresider

Secretary to the Trustees and OHTA Development Manager Roz Phillips

Bankers HSBC Bank Plc
1 St Peters Street
Derby, Derbyshire
DE1 2AE

Independent Examiner Mr S Rogers: FCCA
ADS Accountancy Limited
7 Faraday Court
First Avenue
Centrum 100
Burton on Trent
DE14 2WX

Solicitors

Nelsons Solicitors
LLP Pennine House
6 Stanford Street
Nottingham NG1 7BQ

OHTA Advisory Committee

| | |
|-----------------------|-----------------------------------|
| Mr Michel Crépeau | Co-Chair, resigned 1 October 2020 |
| Ms Shamini Samuel | Co-Chair, resigned 1 October 2020 |
| Mr Michael Connor | Co-Chair |
| Mr Jason Hodgkiss | |
| Mr Peter-John Jacobs | Resigned 9 June 2020 |
| Dr Sharann Johnson | Co-Chair |
| Mr Mark Katchen | |
| Mr Terry McDonald | |
| Mr Maharshi Mehta | Appointed 22 September 2020 |
| Dr Deborah Nelson | |
| Ms Lydia Renton | Appointed 17 June 2020 |
| Mr Bert Schiller | Resigned 20 February 2020 |
| Dr Jas Singh | |
| Dr Albert J Tien | Appointed 17 June 2020 |
| Mr Alex TSE Chun Kuen | |
| Dr David M Zalk | Resigned 9 June 2020 |

OHTA Awards and Qualifications Committee

| | |
|-----------------------|------------------------|
| Ms Lynn O'Donnell | Chair |
| Ms Andrea Hiddinga | Appointed 7 April 2020 |
| Mr Peter-John Jacobs | |
| Dr Sharann Johnson | Appointed 20 May 2020 |
| Mr Rene Leblanc | |
| Ms Frederique Parrot | |
| Ms Margreet Sturm | Resigned 7 April 2020 |
| Mr Alex TSE Chun Kuen | |
| Ms Lisa Williams | |

OHTA Editorial Committee

| | |
|------------------|--------------|
| Mr Sven Hoffmann | Chief Editor |
|------------------|--------------|

OHTA Online Training Delivery Task Group

| | |
|-----------------------------|-------|
| Mr David O'Malley | Chair |
| Ms Andrea Hiddinga | |
| Mr Sven Hoffmann | |
| Dr Seymour Zachary Mansdorf | |
| Mr Terry McDonald | |
| Mrs Lucetta Jane Weaver | |

Ms Lisa Williams, Ms Alison Greaves Liaison with BOHS

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2020**

The Trustees have pleasure in presenting their report and accounts for the period ended 30 September 2020.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Governing Document

Incorporated on 24 September 2009 as a limited company by guarantee, the Occupational Hygiene Training Association (OHTA) was registered as a charity on 11 August 2016. The Trustees are governed by the Articles of Association incorporated 12 January 2015 as amended by special resolution dated 23 May 2016, and the Byelaws adopted on 2 March 2015.

Member Associations

According to the Articles of Association, membership is open to any organisation which is a member of the International Occupational Hygiene Association (IOHA), or is an awarding body under the National Accreditation Recognition (NAR) scheme, or is otherwise granted membership by the Board. IOHA member associations are encouraged to join OHTA. Membership entitles the associations to vote at general meetings (including in the election of Directors of OHTA), and to contribute to the future direction of OHTA. In return the associations commit to support and promote the development and implementation of the OHTA international training and qualifications framework and encourage, promote and support the use of OHTA modules and qualifications within their area(s) of operation.

There were 27 member associations during the period. The German Society for Occupational Hygiene, Deutsche Gesellschaft für Arbeitshygiene (DGAH) was the latest to join (March 2020).

As part of efforts to increase engagement with member associations, in November 2019 the OHTA Co-Chairs gave a presentation on OHTA to the American Conference of Governmental Industrial Hygienists (ACGIH) Board. In addition, Kevin Hedges, President of Workplace Health Without Borders (WHWB) was invited to share a WHWB update at the March 2020 OHTA Board Meeting.

Due to the unprecedented circumstances of the COVID-19 pandemic, and in accordance with UK Charity Commission guidance, the 2020 AGM was conducted as an online meeting with votes cast in advance.

We thank each of our member associations for their involvement during the period and hope to strengthen our links with them.

Organisational Management

OHTA has a Board of up to 12 directors who are also the Charity Trustees. They manage the Charity through regular Board meetings and are responsible for strategic direction and policy. During the financial year the Board had up to 11 directors at any one time.

The Board is assisted by several committees as follows:

- 1) Established according to the Byelaws, the Advisory Committee provides constructive challenge to the Board as well as functioning in an advisory and support role. During the period of this report, areas of focus included providing feedback and support in relation to the development of the new OHTA website. Michel Crépeau and Shamini Samuel were co-chairs of this committee for the period, handing over to Michael Connor and Dr Sharann Johnson on 1 October 2020. The co-chairs are invited to attend Board meetings.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2020 continued**

- 2) The Exam Delivery Committee is a subcommittee of the Advisory Committee, and includes representation from the awarding body BOHS. It explores methods of delivery, security and accessibility of the examination, with a view to boosting OHTA module participant and examinee numbers.
- 3) The Awards & Qualifications Committee advises the Board on matters relating to awards and qualifications and acts as the liaison between the NAR Awarding Bodies and OHTA. Each NAR Awarding Body was invited to nominate one person to represent them on the committee. Lynn O'Donnell is both chair of this committee and a director of OHTA. During the period the committee membership was refreshed with the addition of new representation from The Australian Institute of Occupational Hygienists (AIOH).
- 4) The Editorial Committee. Sven Hoffmann is the Chief Editor. A number of editorial working groups are actively involved in developing new training materials and revising existing ones.
- 5) Online Training Delivery Task Group. Chaired by David O'Malley, this working group was established in 2020 to develop protocols for the approval of remote (online) teaching of the OHTA modules. Further information can be found on page 9.

Within these committees, OHTA benefits from the commitment and support of many hardworking people who give their time and expertise voluntarily.

During the period the Scholarship Committee was not active. Although a modest scholarship fund remained, there were no new applications.

Professional support services are provided through the British Occupational Hygiene Society (BOHS), an OHTA member association. Roz Phillips, OHTA Development Manager, acts as the main point of contact for services that include implementation of strategy and policy, day-to-day running of operations and secretariat support.

Director Recruitment and Training

Directors are either nominated by the member associations or co-opted for their specific skills or knowledge. Appointments are approved by the member associations at OHTA's Annual General Meeting. In addition, IOHA appoints a representative to be a director on the Board.

Under the requirements of the Articles of Association, at each AGM the three directors who have been longest in office since their last appointment must retire but can stand for re-election at the same meeting if they wish. If more than three directors were appointed (or re-appointed) on the same day, they must decide amongst themselves, or draw lots as to who should retire and/or stand for re-election. The IOHA representative on the Board is exempt from the retirement requirements.

The Board requires breadth and depth of experience to carry out its duties effectively and efficiently. When recruiting new directors the important attributes are interest in the objectives and work of OHTA, knowledge and experience in IH/OH work globally, demonstrable leadership in a country specific organisation or association, and geographical and cultural diversity.

All new directors receive information about their responsibilities as company director and trustee, including the Charity Commission Guidance 'The Essential Trustee' and 'Charities and Public Benefit'. They have access to all previous Board paperwork and documents outlining the practices and procedures used by the Board for its operation and governance.

All directors give their time voluntarily and received no benefits from OHTA.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2020 continued**

Risk Review

A meeting took place in September 2020 to begin the process of reviewing the charity's risk management approach in line with recent changes to the Charity Commission guidance and rules. The review is ongoing pending the finalisation of a revised strategic plan.

CHARITABLE OBJECTS AND PUBLIC BENEFIT

OHTA's purpose as set out in the Object contained in the company's Articles of Association is *to protect and promote the health of the public by advancing the study and science of Occupational/Industrial Hygiene for the public benefit through the provision of training and education.*

For the purposes of the Object, Occupational/Industrial Hygiene means *the discipline of anticipating, recognising, evaluating and controlling health hazards in the working environment with the objective of protecting worker health and well-being and safeguarding the community at large.*

OHTA's aims are:

- developing educational and training materials;
- promoting good standards of training to ensure effective health protection;
- creating a sustainable model for worldwide training delivery;
- developing a qualifications framework that permits international transferability of skills.

The promotion of occupational/industrial health and hygiene is for the direct benefit of the working population worldwide and the indirect benefit of the whole population. OHTA's charitable activities focus on the provision of training and education in occupational/industrial hygiene with the aim of protecting worker health and well-being and safeguarding the community at large. OHTA raises awareness of the issues and helps to train people in occupational hygiene, equipping individuals with the skills necessary to control or prevent the exposures that lead to illness and death, thereby delivering an improved public benefit in reducing the incidence of ill-health caused or made worse by work.

OHTA has developed an international qualifications framework aimed at promoting good, consistent quality of training, encouraging international transferability of skills and qualifications, building capability close to the point of need, and creating a sustainable business model. The training and qualification scheme has no formal entry requirements and provides a modular way of building skills to match local needs. By promoting good standards of training and building capability close to the local point of need, OHTA provides access to occupational hygiene training for nations without a framework for training already in place. Some of the people trained will go on to obtain higher professional qualifications in occupational hygiene.

OHTA has developed educational and training materials which are available on OHTA's website, www.ohlearning.com, and may be downloaded and used free of charge by students, employers and training providers. OHlearning has been accessed in 212 countries (2013 – 2020) and OHTA modules have been taught in over 50 countries. By ensuring there are no financial barriers to accessing the educational materials, OHTA's purpose is beneficial to all the public and particularly to those in poor and developing countries.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2020 continued**

OBJECTIVES, STRATEGY AND ACTIVITIES

OHTA's main objectives for the period were:

- continue to approve and support training providers in order to develop good standards of occupational hygiene training and increase access to such training;
- proactively support training providers and their students by introducing protocols for online (remote) training delivery in response to the COVID-19 pandemic;
- continue the editorial review of the modules to improve quality and relevance;
- continue the development of new modules to expand training content across a broader range of occupational hygiene and other risk-related disciplines;
- explore new methods of course delivery such as online, asynchronous, interactive self-study;
- make translated course materials publicly available to increase worldwide accessibility;
- make progress in the development of the new website, adding content and working closely with the supplier to finalise the specification and functionality;
- communicate regularly with stakeholders to advocate take-up of the training and qualifications scheme, as well as to encourage donations/sponsorship and to share relevant COVID-19 communications;
- develop collaborative relationships with like-minded organisations in pursuit of the shared goal of global prevention of worker illness and injury.

Activities focused on progressing the above objectives. Stakeholders included member associations, professional and governmental organisations, training providers, employers and students.

Draft volunteer protocols and guidance document were developed during this period.

Strategic Plan

In recent years the three strategic areas of focus have been Marketing and Communications, Funding and Alliances. Strategic development continued during the period, but a major revision and update of the strategic plan is due in late 2020/early 2021.

The Trustees confirm that they have referred to the information contained in the Charity Commission's general guidance on public benefit when reviewing OHTA's aims and objectives and in planning its future activities, and have complied with their duties under the Charities Act 2011. The Trustees regularly consider how planned activities will contribute to the aims and objectives they have set.

ACHIEVEMENTS AND PERFORMANCE

Educational Output and Training Materials

In July 2020 OHTA diversified its educational output with the launch of an online Occupational Safety and Health Awareness course. The development team, led by OHTA trustee Dr Zack Mansdorf, in partnership with the instructional design team of the Phylmar Academy, a division of the Phylmar Group, produced an online, self-paced, asynchronous, interactive three hour course addressing a broad spectrum of basic health and safety related issues. It is aimed at workers and supervisors who are involved in or interested in the protection of workers and themselves from workplace hazards. This demonstrated OHTA's intention to incorporate safety features in certain modules following feedback from stakeholders. In order to reimburse development costs, the course is priced at a very modest \$50.00. A basic set of Health and Safety Awareness slides was also developed by Dr Mansdorf and made universally accessible as a free download via the OHlearning website.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2020 continued**

The review and development of training materials continued throughout the period, helping to ensure the usefulness and applicability of OHTA courses and expand the range of topics covered.

In January 2020 OHTA published the OH/IH in Mining & Mineral Processing Industries module, the first of a new series of modules providing specialist learning opportunities for specific audiences. The manual was originally developed by Associate Professor Brian Davies and Mr John Henderson of the School of Health Sciences at the University of Wollongong, Australia, with more recent revisions by Ross Di Corleto, Ian Firth and Tim White. There is no formal assessment; instead training providers are invited to produce their own assessment as needed.

During the time period progress was also made on a second new specialist Occupational Hygiene module relating to the Pharmaceutical industry.

In early 2020 a dedicated editorial review team began work on the revision of the intermediate level module W507 Health Effects of Hazardous Substances. Progress was also made on the reviews of the W503 Noise – Measurement and its Effects, W504 Asbestos and Other Fibres, W506 Ergonomics Essentials and W505 Control of Hazardous Substances modules.

As part of the continuing collaborative relationship between NIOSH and OHTA, NIOSH provided an informal review of the revised W501 Measurement of Hazardous Substances student manual. It was chosen because it was a suitable fit for NIOSH expertise and in particular need of volunteer resource.

The verification of the French translation of the W201 Basic Principles in Occupational Hygiene course manual was completed in autumn 2019. OHTA wishes to thank Frederique Parrot of Sanofi Group for providing the translation, and Nathalie Argentin, Vincent Perret and Aymeric Bencib for their review and validation. The following year, work began on French and Portuguese translations of the W502 Thermal Environment student manual. An update of the Spanish translation is also in process. As OHTA's range of translated course materials expands, the accessibility of the training scheme increases.

Training Activity

During the early stages of the COVID-19 pandemic, and in response to the challenges being faced by training providers, OHTA formed an Online Training Delivery Task Group to develop protocols for the approval of remote (online) teaching of the OHTA modules. Chaired by David O'Malley, the Task Group worked closely with awarding body BOHS to ensure alignment with online assessment processes including protocols for conducting formative assessments remotely. The introduction of an online training framework made it possible for Approved Training Providers (ATPs) to continue to offer quality training while adhering to health protection measures. It also enabled them to reach a wider audience, benefitting students unable to travel. Not surprisingly, it proved popular and demand increased over the summer.

During the period, the Online Training Delivery Task Group approved applications from 14 ATPs who wished to teach courses remotely. These ATPs were based in Kuwait, India, Singapore, Nigeria, South Africa, Australia, New Zealand, UK, Republic of Ireland and USA. There were an additional 12 expressions of interest.

The international reach of OHTA training was further demonstrated during the period through the approval of seven new ATPs from across the globe. These ATPs are based in both developed and developing countries including Ghana, Nigeria, India, Australia, UK, USA and Canada.

All ATPs were advised of the publication of updated formative assessment guidelines for each W500 series module and revised course equipment list following review by BOHS in consultation with OHTA.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2020 continued**

28 ATPs delivered 116 OHTA courses, with 847 examinations taking place in 15 countries (based on BOHS data and including online examinations, with country identified by ATP office address for the purposes of this report). This represents a 37% decrease in number of examinations in comparison with the previous financial year. While this is undoubtedly a significant downturn, it is to be expected given the COVID-19 pandemic, and encouraging that 12 training providers were able to continue teaching via online delivery in spite of the circumstances.

Pass rates for BOHS examinations remained generally high, including 99% for W507 Health Effects of Hazardous Substances, 96% for W504 Asbestos and Other Fibres, and 95% for W201 Basic Principles of Occupational Hygiene. These pass rates combine data from both online and paper examinations. They indicate teaching of consistently high quality, benefitting the students and the wider public through sound dissemination of occupational hygiene principles.

Six students from Angola, South Africa, Iraq, Saudi Arabia, Ireland and New Zealand were awarded the International Certificate in Occupational Hygiene (ICertOH). 23 other students made progress towards earning the award, from Nigeria, South Africa, Botswana, Tanzania, Bahrain, Oman, Qatar, China, Australia, New Zealand, Equatorial Guinea, Trinidad and Tobago, Russia, France, Switzerland and Ireland. The certificate demonstrates technical knowledge and practical skills in identifying health hazards, assessing occupational exposure and testing control measures. It is suitable for technicians and technologists who carry out measurements and testing in workplaces. The qualification has been designed so that it can be recognised by national associations as contributing to their own requirements for professional accreditation, thus contributing to the international transferability of skills. For each awardee, the certificate represents a significant achievement over a considerable period of time, as the student must complete six OHTA intermediate modules and a Personal Learning Portfolio based on three years' experience, as well as pass an interview.

OHTA developed and published a new ATP application form in an improved format, following consultation with the BOHS Technical Advisory Group. OHTA also began to review and update its guidance for ATP applicants (in development at the time of writing).

Marketing & Communications

One edition of the OHTA e-bulletin was circulated to approved training providers and other stakeholders. Four OHTA announcements were made and three other notices shared at the request of trustees and stakeholders. Three news items were posted on the website with accompanying social media. Various additional LinkedIn and Twitter posts were shared relating to specific OHTA activity. The number of social media followers continued to grow, with a 9% increase for Twitter (current total 1018) and 8% for the LinkedIn Group (320). New posts on the LinkedIn company page attracted 622 followers. Various partner organisations, including member associations and IOHA, forwarded information to their members, and raised awareness of OHTA in other ways through their newsletters and e-bulletins. OHTA also responded individually to numerous enquiries, including providing supporting information and mutually beneficial suggestions where there were more unusual requests relating to usage of training materials or access to training.

Towards the end of the financial year a communications task force was established with a view to strengthening and expanding OHTA's communications output.

The organisation had a presence, virtual or otherwise, at various international conferences through the efforts of OHTA and other partner organisations. A stakeholder meeting took place at AIOH 2019 in Perth, Australia. OHTA participated in a collaborative virtual session at AIHce 2020 on global EHS organisations and building worldwide capacity. OHTA also had a notable presence at the BOHS annual conference, OH2020, with trustees participating in virtual sessions on global collaborations in occupational hygiene development and competency, and on building capacity through education communication and collaboration.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2020 continued**

The OHlearning website continued to be maintained and updated by the BOHS Support Services team. A new section was introduced providing details of self-directed, asynchronous online learning, specifically the AIHA Basic Principles of Occupational Hygiene course and the Occupational Safety and Health Awareness course. Two new sets of training materials were also published on the website, A1001 OH/IH in Mining & Mineral Processing Industries and the Health and Safety Awareness slides, as well as a French translation of the W201 Basic Principles of Occupational Hygiene student manual.

Meanwhile work began in earnest on developing the new website. Following the previous year's agreement with the American Industrial Hygiene Association (AIHA) to provide the wireframe, maintenance and future hosting services, OHTA worked with AIHA to finalise the specification and finetune the functionality. A significant amount of content was added during the period. The aim was to produce a website that is both easy to understand and to navigate for the benefit of its wide range of users.

Partnerships and Collaboration

OHTA continued to develop international collaborations aimed at extending the reach and ensuring the financial sustainability of the training scheme and qualifications framework. This includes the aforementioned activity with NIOSH.

Within the framework of its marketing alliance with OHTA, AIHA continued to offer its eLearning course based on OHTA training materials, providing an introduction to the broad principles in occupational hygiene. The course is aimed at health and safety professionals, occupational health specialists, and other industry specialists who want a broader understanding of how their role interfaces with health issues in the workplace. AIHA is an OHTA member association, Approved Training Provider and sponsor.

During the period the American Board of Industrial Hygiene (ABIH) continued to accept the OHTA W201 and the W500 series modules for applicants documenting IH Coursework, and the W500 series modules for Certified Industrial Hygienists (CIHs) claiming Certification Maintenance (CM) credit in the Education category.

OHTA member associations the Southern African Institute of Occupational Hygiene (SAIOH) and Workplace Health Without Borders (WHWB) successfully ran examinations for the W201 Basic Principles of Occupational Hygiene module, expanding the reach of basic occupational hygiene training in Southern Africa and Tanzania.

BOHS remained the main Awarding Body for OHTA modules. As previously mentioned, following the COVID-19 outbreak BOHS developed protocols for online assessment, investing in the necessary infrastructure to enable online examination delivery from May 2020 onwards. BOHS is an OHTA member association.

OHTA frequently explores ways to collaborate with other not-for-profit organisations with similar goals. During the period discussions took place with Safety 4 Non Profits, the ITCILO International Training Centre in Turin, InTERRACT and The Laboratory Safety Institute (LSI). Quarterly calls between OHTA and WHWB enabled both organisations to exchange relevant information and provide mutual support.

FINANCIAL REVIEW

The statement of financial activities shows unrestricted funds for the period of £102,949 (previous period £99,232). The surplus for the period is £3,717 (previous period £34,333). The principal income source was the course levy per student paid by training providers at the time of the examination. This was significantly impacted by the downturn in number of examinations due to the COVID-19 pandemic, as described on page 10. OHTA received one donation, as well as additional income from the examining body levy. The main expenditure for the period was the professional support services contract.

The Trustees consider the overall financial situation of the charity to be satisfactory.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2020 continued**

During the period of this report, the governance framework and operational guidelines for the OHTA US chapter were developed. The US Chapter has charitable status as a 501 (c)(3) in the United States (Employer Identification Number 83-2036073) and was established as part of OHTA's efforts to ensure financial sustainability. In time it is expected to substantially increase OHTA's opportunities to seek funding from a broader spectrum of sources. The Trustees receive regular updates on developments within the US Chapter.

RESERVES POLICY

OHTA maintains reserves, which are unrestricted, as part of its risk strategy. The level of reserves will be determined by the Board as part of the budget setting process. The minimum level of reserves will be determined by an assessment of risk, a review of contractual obligations, and a review of future income and expenditure.

The level of reserves will be maintained at a level which can cover the following commitments in the event of financial crisis or insolvency. This is considered to be:

- a) Funds to cover the remainder of payments (or notice period) of the professional support services contract.
- b) Funds to cover the remainder (or notice period) of any other contractual agreements.

PLANS FOR THE FUTURE

During the financial year ending 30 September 2021, the strategic plan will be revised and updated to encompass new strategic goals for the period 2021- 2024. There will be a particular focus on global customer development, training programme development and the increased sustainability of the business/financial model.

OHTA will continue to work closely with its many external partners and stakeholders.

The development and launch of the new website, with accompanying marketing and communications, will remain a key priority. A new domain name, www.ohtatraining.org, will come into use when the new website goes live.

Communication with stakeholders will be improved, with the introduction of a monthly, people-focused e-bulletin from January 2021 onwards. This activity is being driven by the OHTA News Team, chaired by Deborah Dietrich and Jason Hodgkiss.

Several module reviews are nearing completion, most notably W503 Noise – Measurement and its Effects and W507 Health Effects of Hazardous Substances.

As the COVID-19 pandemic continues to affect global training opportunities, OHTA remains committed to supporting its training providers in their online teaching endeavours. The impact of this new method of course delivery will be assessed in the coming months. Given the perceived benefits for both students and training providers, it is likely that online (remote) training will become an integral feature of the OHTA international training scheme and qualifications framework.

**OCCUPATIONAL HYGIENE TRAINING ASSOCIATION
REPORT OF THE TRUSTEES
For the period ended 30 September 2020 continued**

TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS

Law applicable to charities in England and Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the Charity's financial activities during the year and of its financial position at the end of the year. In preparing those financial statements, the Trustees are required to:

- select suitable accounting policies and then apply them consistently;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable accounting standards and statements of recommended practice have been followed, subject to any 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 business.

The Trustees are responsible for keeping accounting records which 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 Charities Act 2011. 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.

Approved by the Trustees and signed on their behalf by:



.....
Chris Laszcz-Davis
Co-Chair



.....
Steven Verpaele
Co-Chair

Approved by the Trustees on:

Date 16 March 2021

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
OCCUPATIONAL HYGIENE TRAINING ASSOCIATION**

Year ended 30 September 2020

I report on the accounts of the Trust for the year ended 30 September 2020 which are set out on pages 15 to 19.

Respective responsibilities of trustees and examiner

The Charity's Trustees are responsible for the preparation of the accounts. The charity's Trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 145 of the 2011 Act;
- follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act; and
- state whether particular matters have come to my attention.

Basis of independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the Charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as Trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit and consequently no opinion is given as to whether the accounts present a "true and fair view" and the report is limited to those matters set out in the statement below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- 1 which gives me reasonable cause to believe that, in any material respect, the requirements:
 - to keep accounting records in accordance with section 130 of the 2011 Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the 2011 Act have not been met; or
- 2 to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



Mr S Rogers FCCA of ADS Accountancy Limited

*Chartered Certified Accountants
7 Faraday Court
First Avenue, Centrum 100
Burton Upon Trent
DE14 2WX*

Date: 16th March 2021

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

STATEMENT OF FINANCIAL ACTIVITIES

For the year ended 30 September 2020

| | Notes | Total funds (unrestricted) 2020 £ | Total funds (unrestricted) 2019 £ |
|---|-------|--|--|
| <u>Income</u> | | | |
| OHTA Course Levy | | 42,200 | 55,600 |
| Donations & Sponsorship | | 7,742 | 22,108 |
| Donation from Previous Organisation | | - | - |
| Interest received | | - | - |
| Examining Body Levy | | 3,684 | 1,300 |
| | | <hr/> | <hr/> |
| Total income | | 53,626 | 79,008 |
| | | <hr/> <hr/> | <hr/> <hr/> |
| <u>Expenditure</u> | | | |
| Management charges | 3 | 44,418 | 36,969 |
| Charitable activities | 4 | 4,431 | 5,408 |
| Governance costs | 4 | 1,060 | 2,298 |
| | | <hr/> | <hr/> |
| Total expenditure | | 49,909 | 44,375 |
| | | <hr/> <hr/> | <hr/> <hr/> |
| Net income/ (expenditure) before other recognised gains/losses | | 3,717 | 34,333 |
| Other recognised gains/losses | | | |
| | | <hr/> | <hr/> |
| Net movement in funds | | 3,717 | 34,333 |
| Total funds brought forward | | 99,232 | 64,899 |
| | | <hr/> | <hr/> |
| Total funds carried forward | | 102,949 | 99,232 |
| | | <hr/> <hr/> | <hr/> <hr/> |

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

BALANCE SHEET

At 30 September 2020

| | Notes | 2020 £ | 2019 £ |
|---|-------|----------------|----------------|
| Current assets | | | |
| Bank and Cash | | 91,605 | 98,005 |
| Debtors | | 16,351 | 3,704 |
| | | <u>107,956</u> | <u>101,709</u> |
| Current Liabilities | | | |
| Creditors: amounts falling due within one year | 5 | (5,007) | (2,477) |
| Net current assets/ (liabilities) | | <u>102,949</u> | <u>99,232</u> |
| Total Assets less Current Liabilities | | | |
| Creditors: amounts falling due after more than one year | | - | - |
| Net Assets | | <u>102,949</u> | <u>99,232</u> |
| Funds of the charity | | | |
| Unrestricted funds | | 102,949 | 99,232 |
| | | <u>102,949</u> | <u>99,232</u> |

For the year ending 30 September 2020 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

Directors' responsibilities:

- The members have not required the company to obtain an audit in accordance with section 476 of the Companies Act 2006.
- The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts.
- These accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime.

Approved by the Board of Trustees and signed on its behalf by:

Chris Laszcz-Davis



Chris Laszcz-Davis
Co-Chair

Steven Verpaele
Co-Chair

Date 16 March 2021

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

NOTES RELATING TO THE ACCOUNTS

Year ended 30 September 2020

1. Basis of preparation

Basis of accounting

The accounts have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard for Smaller Entities published on 16 July 2014, the Financial Reporting Standard for Smaller Entities (FRSSE), and the Charities Act 2011 and applicable regulations.

The accounts have been prepared under the historical cost convention, with the exception that investments are valued at market value.

Consolidated accounts have not been prepared as the Charity qualifies for small accounts and the subsidiary is dormant.

2. Accounting policies

Income

All income is accounted for gross and when receivable.

Expenditure and Liabilities

Liability Recognition

Liabilities are recognised as soon as there is a legal or constructive obligation committing the Charity to pay out resources.

Governance Costs

Include costs of the preparation and examination of statutory accounts, the costs of Trustee meetings and cost of any legal advice to Trustees on governance or constitutional matters.

Grants payable without performance conditions

These are only recognised in the accounts when a commitment has been made and there are no conditions to be met relating to the grant which remain in the control of the Charity.

Support Costs

Support costs have been allocated to the activity based on staff time.

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

NOTES RELATING TO THE ACCOUNTS

Year ended 30 September 2020

| | | 2020 | 2019 |
|-----------|---|-------------------|-------------------|
| | | £ | £ |
| 3. | Management Costs | | |
| | Investment management fees net of rebates | 44,418 | 36,969 |
| | | <u> </u> | <u> </u> |
| | | | |
| 4. | Support Costs | | |
| | | Charitable | Governance |
| | | Activity | |
| | | £ | £ |
| | | 2020 | 2019 |
| | | Total | Total |
| | | £ | £ |
| | Secretarial and accountancy | - | - |
| | Independent examination | - | 720 |
| | Bank charges | 124 | - |
| | Telephones & Teleconference | - | 287 |
| | Travel and subsistence | - | - |
| | Scholarship awards | (1,626) | - |
| | Website and IT | 4,878 | - |
| | Marketing fees | - | - |
| | Equipment hire | - | - |
| | BOHS Admin fee | 1,055 | - |
| | Professional fees | - | 53 |
| | | <u> </u> | <u> </u> |
| | | 4,431 | 1,060 |
| | | <u> </u> | <u> </u> |
| | | 5,491 | 7,706 |
| | | <u> </u> | <u> </u> |

OCCUPATIONAL HYGIENE TRAINING ASSOCIATION

NOTES RELATING TO THE ACCOUNTS

Year ended 30 September 2020

| 5. Creditors | 2020 | 2019 |
|------------------------|-------------|-------------|
| | £ | |
| <i>Within one year</i> | | |
| Trade creditors | 4,222 | 131 |
| Other creditors | 785 | 2,346 |
| | <hr/> | <hr/> |
| | 5,007 | 2,477 |
| | <hr/> <hr/> | <hr/> <hr/> |

| 6. Independent Examiner | 2020 | 2019 |
|--------------------------------|-------------|-------------|
| | £ | £ |
| Independent Examiner's fee | 720 | 720 |
| | <hr/> | <hr/> |

7. Trustees Remuneration and Expenses

No member of the Board of Trustees, nor any person connected with any such member, has received or is due to receive, any remuneration or expense payment for the year, whether directly or indirectly, from the Charity's fund.

8. Other Information

Occupational Hygiene Training Association is a private limited company by guarantee without share capital and incorporated in England. Its registered office is:

5/6 Melbourne Business Court,
Millennium Way
Pride Park
Derby
Derbyshire
DE24 8LZ