



The Queen's Award
for Voluntary Service



OLIVE TREE CANCER SUPPORT GROUP

Annual report and accounts for the year ended
31 August 2022

Registered charity No. 1157386

The Olive Tree Cancer Support Centre, Crawley Hospital,
West Green Drive, Crawley, West Sussex RH11 7DH



Social media

www.olivetrecancersupport.org.uk/



Contents

Chairman's statement.....	3
1. Who we are and what we do	4
1.1 Background and a summary of charity activities in 2021/2022.....	4
1.2 Achievements and performance	7
1.3 Looking forward statement.....	8
2. Our Long-Term Strategy.....	8
2.1 Our Charity strategy to 2030	8
3. How we operate	10
3.1 Charity information, structure and governance	10
3.2 Charity operations and risk management	12
3.3 Fundraising activities.....	15
3.4 Stakeholder management and communications	17
4. Financial report	19
4.1 The Financial Review 2021/2022	19
4.2 Report of the Independent Examiner	22
4.3 Income and Expenditure Account.....	23

Chairman's statement



Graham Nicoll
Chairman

I am pleased to report that impressive progress has been made by our charity in the course of the 2021/22 financial year, and would like to thank our staff, volunteers and supporters for their dedication and hard work, which have been integral to making this happen, whilst continuing to meet our consistently high standards in service delivery.

Although the restrictions and guidelines resulting from the coronavirus pandemic have been relaxed, the Olive Tree has continued with certain Covid-19 safety measures in order to protect the most vulnerable of our members, including the wearing of masks, hand sanitiser and screens.

We have now started to experience significant increases in the number of new patients and users at both of our Centres, which had been anticipated following the delays in diagnosis and treatment as a consequence of the pandemic. In order to meet the increasing demand for our services, in particular in Horsham, we moved from the information hub based at Horsham Hospital to a new centre at Lavinia House, Horsham, which became operational in October 2022, offering a full range of services comparable with those already offered at our Crawley centre.

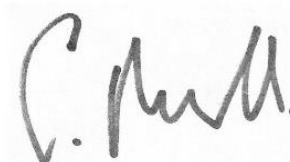
Through the course of the 2021/22 year, we raised an impressive total income of £184,000, a new annual high for the Olive Tree. This was close to the level of expenses that we have forecasted we will incur in the current 22/23 financial year. However, £82,000 of this arose from an unprecedented level of bequests from wills. The rest of our income, at just over £100,000, almost exactly matched the equivalent figure for the previous year. Given that we were operating without a Fundraising Manager for the first four months of the year (whilst in the course of recruitment), I believe that this was a significant achievement.

To support both the increased number of service users and the new Horsham location, the Olive Tree will now require a significantly higher level of income. Unfortunately, the current financial year 2022/23 has proved far more challenging, with the first six months to February 2023 seeing an income of only £34,000, resulting in a net outflow of funds of more than £65,000. As a response to this, we have focused further on increasing the numbers of, whilst maintaining the quality and relevance of, our grant applications. Though we (at the end of the 2021/22 financial year) had a healthy coverage from our reserves, these have already significantly reduced, so I implore readers of this report to consider how they might be able to support us through these very challenging times.

Looking forward

The current pressures on financial income and personnel have affected our ambition in the short-term. The Board of Trustees have expended considerable time, thought, and effort in producing a new long-term strategy and plan, mapping out an exciting future for the Olive Tree in the coming years. However, the supporting plan for the next 12 months deliberately will not require additional investment to deliver. Not until the financial situation improves will we progress with other proposed actions in support of the strategy.

The initiatives we are currently focused on include a drive to improve in our awareness and relevance to potential users guided by enhancement of our understanding of the patient journey. In addition to our regular patient satisfaction survey, in 2023 we will be launching a questionnaire to Centre visitors to enhance our understanding of their needs and experiences.

A handwritten signature in dark ink, appearing to read 'G. Nicoll', written in a cursive style.

Graham Nicoll
Chair

1. Who we are and what we do

1.1 Background and a summary of charity activities in 2021/2022

Charitable object

The charitable object of the Olive Tree Cancer Support Group (the Olive Tree), as registered with the Charity Commission, is to relieve the physical or emotional distress of persons with cancer and their partners, families, friends and carers through the provision of services.

The Olive Tree operates from its support centre in Crawley and, from October 2022, its support centre in Horsham, the latter replacing the Horsham Information Hub which had operated from Horsham hospital. The Olive Tree is open to everyone who is affected by cancer irrespective of whether newly diagnosed or a longer-term patient as well as their families. There has been a marked increase in demand for our services. In 2021/22, our Centres welcomed 245 new users, with 48 of these initially attending our new Horsham facilities.

The Olive Tree is a welcoming and trusted 'safe place' for its cancer patient community and for their loved ones, offering reassurance and relaxation at times of most need. Its empathetic and supportive team provides valued services, help and key understandings that enable and empower patients to meet challenges throughout their cancer journey.

In the reporting year, the number of new patients attending the Olive Tree have significantly increased year-on-year (245 vs 140, an increase of 75% year-on-year). We provided services to an estimated 24% of newly diagnosed cancer patients living in Crawley, and 5% in Horsham (see table below). This shows that our support is relevant to many more potential patients, particularly in Horsham.

Demand for our services will continue to increase. Current estimates suggest that about half of the UK population will be diagnosed with cancer during their lifetime. Also, due to advances in medical care, more people are being cured and surviving longer, which means we will support our patients, their family members, carers and friends for longer.

Area of residence	New users at the Olive Tree 2021/22 (prior year)	New cancer cases (as of Feb 2020, no 2021/22 data) ¹	Total area population (2019) ²
Crawley & local areas	126 (70)	530	112,410
Horsham area	64 (47)	1,400	143,790
Other areas	55 (23)		
Total	245 (140)	1,930	256,200

Our services are not restricted to those living within the two town boundaries. Our users come from many local areas including Broadfield, Bewbush, Langley Green, Horley, Burgess Hill, East Grinstead, Haywards Heath and Billingshurst. The closest other cancer support centres to Crawley are in Chichester, Guildford, Redhill and Brighton, demonstrating the unique position of the Olive Tree to meet the demand for services from an extended region of local communities. As such, it is estimated that we are potentially accessible by a total population approaching 500,000 people.



¹ <https://www.cancerresearchuk.org/cancer-info/cancerstats/local-cancer-statistic>. Crawley and Horsham, February 2020.

² Sussex Community Foundation Insight reports, October 2020

Supportive services

The aim of the Olive Tree is to provide therapeutic care to cancer patients and those supporting them, enabling them to cope better with their disease and treatment. We are a self-funded charity, and our therapies and services complement the medical support that is given to cancer patients by the NHS. We do not offer any medical treatments or advice.

The Olive Tree provides many different types of services to its users. We had 2,241 user visits to our Centres in 2021/2022 (up by 80% on the previous year, at 1,247 visits, a reflection both of 'a return to relative normality' following the pandemic and of the increasing demand for our services) with an average of 187 per month (highest month was May 22 with 247 visits). Complementary therapy continues to be the most popular reason for a visit (at 58%) followed by counselling (11%).

We ran a series of workshops throughout the year at both centres, including mindfulness, nutritional therapy and art projects. We regularly conduct sessions with Headwrappers, who help hair loss and scalp care and with Nicola Jane, who provides a lingerie fitting and retail service for breast surgery patients. We continue with a face to face and remote, blended, approach for new patient interviews, counselling, coaching and hypnotherapy, offering a more flexible access to meet patients' specific requirements.

Services	Description
Information support	Library of books, magazines, local and national information, and Macmillan brochures.
Complementary therapies	<p>Complementary therapies are offered to anyone who visits the Centre, both those with cancer and their supporters. These therapies complement orthodox cancer treatments and improve the quality of life by relieving stress and tension. They are based on the holistic principle that healing works on all levels: spiritual, mental, emotional and physical.</p> <ul style="list-style-type: none"> Acupuncture Aromatherapy Energy Healing Meditation and relaxation Reflexology NADA protocol ear acupuncture Bowen Technique Emotional Freedom Technique (EFT) Pranic Healing Massage Reiki Emotional Support Therapies Cranio-Sacral Therapy Hypnotherapy Indian Head Massage Oncology Massage
Counselling & Coaching	Counselling and Coaching offers patients alternative approaches to find their own solutions to difficulties, and a way through a crisis and beyond.
Support groups	Breast cancer group, Secondaries club, Prostate cancer group
Workshops	Various topics - Mindfulness, Card Making, Headwrappers
Pink Ribbon programme	Exercise for breast cancer patients
Exercises classes	Yoga, Pilates, Qigong
CAB Welfare/ Benefits	Confidential benefits advice
Drop in	Social afternoons to discuss any concerns or just speak with someone
Wig service	Selection of wigs, hats, scarves and bandanas with a fitting service

We continue to receive excellent feedback from our users with their testimonials included throughout the report.

“ *This is a fabulous place - everyone is so lovely, friendly and kind. The Olive Tree is just brilliant and deserves 10 stars!*

“ *I found the whole experience really helpful, having originally thought that I wouldn't gain a lot from counselling. I would recommend this service to anyone in a similar situation to mine.*

Impact of Covid-19

The Centre in Crawley was made Covid-19 secure in 2020 and we have remained open since the beginning of the pandemic.

The ongoing threat of Covid-19, in the light of patients' possible vulnerability, meant that we continued with new ways of working developed during the pandemic. Telephone and online video platforms (Teams and Zoom) are still available for counselling, coaching, ETF, and hypnotherapy, and are now provided as a blended convenient option for those unable to attend the Centre for regular appointments.



“ *Thank you for being there at the worst and saddest time of my life. Losing my lovely husband so unexpectedly and cruelly has devastated me and overwhelmed me. You have been there to support, guide and help me and your kindness has been wonderful. You play a very important role to people like myself and all I can do is say a very big thank you.*

Horsham Centre and Information Hub

The arrangement at the Information Hub and the sessions at Total Therapy, Horsham continued to thrive during the end of 2021 and beginning of 2022. However, it was increasingly apparent that the need for Olive Tree services in Horsham was greater than we could provide using those facilities.

Early in 2022 the search began again for suitable accommodation and in April negotiations started with Age UK Horsham for the Olive Tree to lease part of their premises in Lavinia House. This now includes an office, reception area, 2 therapy rooms and a counselling room. The plan was to move to the larger premises at Lavinia House during the summer months, including the transfer of the Macmillan Support Worker and the Fundraising Manager. It was envisaged at this stage that the Centre would be open to clients by the end of August 2022, and fully operational by Christmas 2022.

Whilst we incurred some frustrating delays in the process of the preparation for full opening of the Centre, all rooms at Lavinia House became operational in October 2022 and we were able to formally launch with an official celebration on 22nd February 2023.

1.2 Achievements

Feedback received from users

“ I found it immensely helpful to know that I could always drop in to chat about my fight with multiple myeloma and also to make use of the services and facilities.

“ I came in to try on some wigs and was allowed to take three home to try on with different outfits. I am so pleased and happy with these.

“ Fab morning and great fun. Learnt things I will be using in the future. Marvellous goody bag of freebies. I walked out feeling on top of the world.

“ Discussing my treatment, ailments, pain, emotional anxiety and (cancer) journey with Olive tree staff and therapists has helped me massively. Being able to discuss these issues with a friendly face and a listening ear has helped me come to terms with living with cancer. My life changed after being diagnosed with an incurable disease at 48 years old and the financial guidance provided by the Olive Tree has helped me in so many ways.

“ I have been doing the CU Fitter exercise classes since they started at the Olive Tree and it is perfect for helping people gently get back into fitness and good health as it has exercises for all abilities. It really does help and also gets your confidence back being able to do something positive on your road to recovery. The trainer is inspirational and explains everything you are doing and how it will help you to recover.

The Queen's Award for Voluntary Service



As reported in the previous Annual Report, we were honoured with The Queen's Award for Voluntary Service (QAVS) in 2020/21, the highest award a voluntary group can receive in the UK, equivalent to an MBE. This recognises our outstanding work that continues to benefit our local community. Mrs Susan Pyper, the Lord-Lieutenant of West Sussex, presented the crystal award and certificate at a presentation evening held at the Crawley RAM Club on 11th October 2021.

From the left: Trevor Chrismas (Trustee). Mrs Susan Piper, Brenda Millar (Volunteer)

1.3 Looking forward statement

Our ambition remains to become a well-recognised, inclusive local charity supporting everyone who needs it, as they or their loved ones are undergoing cancer treatment or living with cancer. Long-term consequences of the pandemic will be felt for some time, including a continuing backlog of cancer patient requirements, both from those who have not yet progressed with treatment, or have unknowingly delayed diagnosis during the times of lockdown. Because of this, and also as a result of the continued increase in the prevalence of cancer in its various forms, the demands for our services will undoubtedly continue to increase.

To meet the increased demand, we have needed to focus on recruitment of further volunteers. It is important that they have the right skills, are motivated and have suitable personalities, in order to maintain our current high standards of delivery and care. We will continue to measure our performance using appropriate assessments, such as user feedback, to ensure that this is the case.

With users now enjoying the experience of on-line services (counselling) in addition to coming to our centres, we continue to explore other ways in which technology might help improve our efficiency, delivery and overall effectiveness. For example, we are (in Q2 2023) in the process of implementing a new online appointment booking system.

Our continued expansion in Horsham will hopefully enable new local business partnerships to be formed, and offers a broader audience from which individual supporters and fundraisers can be sought and engaged.

Whilst we have developed a longer-term strategy during the course of the year (further details follow in the next section), as a first priority it is our duty to 'balance our books' and must be sure that we can fully fund what we currently deliver for the foreseeable future. We are very aware that this is a tough ask, but believe that it is achievable, in particular given the long-term commitment and generosity of our supporters.



2. Our Long-Term Strategy

2.1 Our Charity Strategy to 2030

According to Macmillan analysis as of September 2021, an estimated 3 million people are living with cancer in the UK. This number is predicted to rise to nearly 3.5 million by 2025, 4 million by 2030, and 5.3 million by 2040. This increase is partly due to the UK's growing and ageing population, but also due to improvements in survival/prolonged lifetime through better cancer diagnosis and treatments. We welcome the development of the 10-year cancer plan by the government for England by 2032. It will support further innovation and improvements to care that should result in 75% of cancer cases by 2028 to be of early-stage diagnosis.

Our long-term strategy demonstrates our determination to reach as many people as possible in our local communities. We shall continue to provide a wide range of supportive services that meet the ever-evolving needs of our users. We pride ourselves in living our values in everything that we do.

Our Values

The Olive Tree **C.A.R.E.S.**

Compassion

Approachability

Reassurance

Empathy

Support

Our Vision

Our long-term aim is to be a well-recognised charity that provides free, accessible, personalised, innovative care and support to those affected by cancer in all local communities in Crawley, Horsham and surrounding areas.

Our strategic goals and objectives

1. Engage with more people affected by cancer in our local communities

2. Optimise range of services with focus on personalised care

3. Increase awareness of what we do

4. Collaborate with other local health and cancer care providers

5. Achieve sustainable financial resources to deliver on our strategy

During the past year, the Trustees, supported by senior personnel from the charity, have continued to develop our strategy, but have been cautious in short to medium term ambitions given current pressures on our financial income and limited number of personnel. As such, many of our resultant plans (i.e., elements which would require additional funding and/or significant human resources) must understandably now be delayed until a point when there is confidence in a suitably robust ongoing financial foundation to build further on. However, we will progress with our goal to improve the awareness and relevance of The Olive Tree, initially with the aim to increase our understanding of the patient journey. So, in March 2023 we will be administering a questionnaire to Centre visitors for this purpose and also adding a similar battery of questions for all new Olive Tree members to monitor our progress in this respect.

We will continue to reach out specifically to those within ethnic minority groups and to those in socially deprived areas within the Crawley/Horsham and surrounding area. Through raising awareness of how we can support them, we anticipate a greater adoption of our services going forward. Likewise, we will endeavour to increase the awareness of the Olive Tree, and how we support, among males, with the ultimate aim of greater numbers attending our centres, benefitting from the support we offer.

3. How we operate

3.1 Charity information, structure and governance

Charity registration

The Olive Tree Cancer Support Group is a Charitable Incorporated Organisation (CIO) registered on 9 June 2014. The Olive Tree is governed by its CIO Constitution dated 29 May 2014, which sets out the charity's powers and authorities. The constitution was amended by the Trustees and approved by the members at the Annual General Meeting (AGM) held on 24 February 2021 to facilitate AGMs being held virtually in addition to in-person meetings.

It is regulated by the Charity Commission of England and Wales. Registration number **1157386**.

Address: Wentworth House, Crawley Hospital, West Green Drive, Crawley, West Sussex RH11 7DH

Trustee information

The Olive Tree Board of Trustees provides independent control and has legal responsibility for the management and administration of the charity. The Board is also responsible for the strategic direction of the charity and the authority delegated to Management. The Trustees are elected by the members of the charity at the AGM and, subject to re-election or early retirement, serve for a maximum of three, three-year terms, after which they must stand down for at least twelve months.

Volunteers, employees, professionals, cancer patients, their carers and others are entitled to become members of the Olive Tree and are entitled to attend its AGM and vote on important decisions affecting the charity.

The Board now consists of six Trustees (ethnicity ratio - Asian 33%, White 67%). They all give their time to the Olive Tree on a voluntary basis and receive no remuneration. We are currently fortunate to have a team of Trustees that cover skills and experience from a broad range of backgrounds (industries, functions and cultures), including business leadership, accountancy, marketing, fundraising, market research and consultancy. When assessing potential new Trustee applicants, any relevant or distinct skills and experience are considerations in our selection. Where pertinent, for any area where our experience and/or knowledge are less strong, input is sought from relevant contacts in each of our networks. Trustees are encouraged to directly experience the Olive Tree in action and to engage staff, volunteer and patient feedback, as appropriate, in decision-making processes.



Alla
Levadnaya²



Trevor Chrismas
(Treasurer)



Raj
Limbachia



Graham Nicoll
(Chairman)



Stephen Bailly



Yulia Baynham¹



Louise Cheung

In accordance with section 13 of the CIO Constitution

- 1 Yulia Baynham retired by rotation at the Annual General Meeting held on 30th November 2022 (“The AGM”) and was re-elected for a further 3-year term.
- 2 Alla Levadnaya retired at the Annual General Meeting held on 30th November 2022.
- 3 The charity Trustees may appoint one of their number to chair their meetings and may at any time revoke such appointment. At the date of this report the appointed Chairman is Graham Nicoll.

The trustees would like to thank Alla Levadnaya for her support and dedication to the Olive Tree since joining the trustee board in 2017.

Governance

Trustee meetings take place monthly, every first Wednesday, in person or remotely. The Olive Tree Manager and the Fundraising Manager also attend the meetings to report on their activities. The objective of the sessions is to ensure good governance, provide oversight of charity management and fundraising, ensure robust financial control and identify any improvements to user experience. All meetings have agenda, papers and reports, and minutes are prepared and reviewed.

Trustees undergo regular training from external organisations. Most recent training covered governance, GDPR, safeguarding, fundraising, impact assessment, fraud policy, digital operations, social media and annual reporting.

In addition to mandatory training courses, workshops designed to improve knowledge, skills and behaviours on topics such as safeguarding, EDI, reporting and governance are attended as appropriate.

The Trustees, in exercising their powers and authorities, confirm that they complied with their duty under the Charities Act 2011 and have had due regard to the public benefit guidance published by the Charity Commission. In preparing this report and accounts the Trustees have complied with the requirements, set out in the guidance, to report on the significant activities and achievements of the charity in 2021-2022.

The charity has taken out an insurance policy that provides professional indemnity insurance cover for the Trustees.



3.2 Charity operations and risk management

Our employees and volunteers are an essential part of the Olive Tree Cancer Support Group and without them we could not operate.

Management and Staff



Marilyn Drury
Centre Manager



Helena Taylor
Fundraising Manager



Lisa Balcomb
Administrator



Jackie Nunn
Administrator



Terrie Stephens
Horsham Centre
Manager



Charlotte Hawkins
Communications
Administrator



**Mehrafagh (Afagh)
Kalani**
Administrator

The Olive Tree currently has a staff of seven. The Crawley Centre is managed by Marilyn Drury. Her position is a salaried NHS post, with additional funding by The Olive Tree. Administrative duties in Crawley are conducted by Lisa Balcomb and Jackie Nunn who are employed on a job share arrangement and are both employees of the Olive Tree.

Terrie Stephens has been appointed as Horsham Centre Manager, following our expansion of service in Horsham. At this point, we welcomed Charlotte Hawkins who joined as Horsham Administrator, a part-time role. She subsequently, in January 2023, progressed to the position of Communications Administrator owing to her well-developed knowledge and abilities in social media. Welcome also to Afagh Kalani who joined us in January 2023 replacing Charlotte in her previous Administrator role.



We are very grateful to Marilyn, Helena, Lisa, Jackie, Terrie and now Charlotte and Afagh, for their hard work and commitment in running the day-to-day operations of the Centre, and at the same time giving empathy, compassion and support to everyone who visits the Olive Tree.

Volunteers

The Centre has 53 volunteers (excluding Trustees) including 10 counsellors, 4 coaches, 28 therapists and 11 who help with general administrative duties (Front desk, Drop-in organisers). Our aim is to have volunteers who are happy, engaged in shaping our services and eager to continually support the Olive Tree. Our engagement efforts are ongoing through volunteer lifecycle and we ensure consistent communication and recognition.

Training

The Olive Tree believes that training is key to the effective and efficient delivery of high-quality support to all those who chose to take advantage of the wide range of support services available. Our aim is to have well-trained and well-informed employees and volunteers. The Olive Tree remains committed to providing all necessary support to enable employees and volunteers to complete the tasks required.

The Centre Manager adopts an organised and rigorous approach to the recruitment and training of volunteers to ensure that they are appropriate in terms of skills, qualifications and their alignment with the Olive Tree values. Regular contact is maintained to ensure that the services that they deliver are of the appropriate standard, and they themselves have job satisfaction.

We encourage volunteers to attend training sessions that includes Listening and Responding, First Aid, and Health and Safety. They are also urged to complete safeguarding and infection control courses available online. In addition to this, the Olive Tree funds additional training in Oncology Massage and Lymphatic Drainage Reflexology and, most recently, for Auricular Acupuncture.

We have maintained our link to the “Reward Gateway”, a scheme that provides staff and volunteers with a range of discounts, well-being tools and a new improved method of charity communication.

Risk Management

Trustees are responsible for managing and monitoring risks and having overall accountability. Management provides daily risk management on behalf of the trustees. There are reasonable processes in place for the identification and prevention of major risks, setting risk appetite and ensuring that risks are reviewed when issues arise.

Employees and volunteers involved in delivering charity services have a responsibility to identify any risks associated with delivering their work, and to escalate these risks to the Centre Manager and Trustees.

The trustees and management undertake regular reviews of the risk management action plan and risk register.

We operate a comprehensive annual planning and budgeting process. We monitor performance through the use of key financial and performance indicators which are reported to the Trustees at each meeting.



Reserves targets are calculated by reference to the forward financial outlook and the risks facing the charity, with the aim of ensuring that key services are sustainable, and that early action can be taken to deal with matters as they arise.

Specific risks considered by the Trustees include income, expense, reputation, fraud, cyber security, data protection, and staff and volunteers' risks. Most recently the trustees also considered the potential risks arising out of the Ukraine crisis (impact on fundraising) and made provisions accordingly.

The majority of the Olive Tree's recent income has come from donations including non-recurring, one-off grants and bequests. This fundraising risk is mitigated through a combination of a robust reserving policy and a professional and systematic fundraising approach, supported by volunteers.

The trustees of the Olive Tree are aware of the risk of fraud in charities. The Olive Tree Anti-fraud policy covers counter-fraud mechanisms. Fraud awareness training programmes are planned for all staff and volunteers.

At the Olive Tree we take data protection seriously and our responsibilities are covered in the Data Protection Policy. As a risk mitigation measure, appropriate training is provided for staff.

We will continue to work on developing robust cybersecurity protocols to ensure full security, while at the same time building resilience to respond quickly to attacks with minimal impact on our operations and reputation. We continue our efforts towards alignment with the National Cyber Security Centre (Cyber Essentials framework). We know that security starts with people and our aim is to provide annual cybersecurity training for our staff and volunteers to help them to recognise cyber security threats and avoid making security mistakes.

People, leadership and culture are key to our service delivery. Major risks include the inability to recruit the staff with the right skills, the retention of high calibre employees, and sustaining the culture, may impact our ability to deliver services. We closely monitor and benchmark compensation and benefits, staff support and the supervision framework.

The Olive Tree has a small staff of seven who collectively possess considerable knowledge regarding the charity and its operations. Robust succession plans are being put in place to ensure that tasks can be readily passed on to other members of staff, knowledge is shared, including the documentation of processes and procedures, and there is no impact on charity operations due to staff movements.

Health and safety issues, compliance and regulatory risks are controlled through the deployment of policies and procedures. We have a robust volunteer recruitment process with appropriate safeguarding DBS checks where required.

Robust Financial control

Processes and procedures are in place to

- protect the charity's assets
- identify and manage the risk of conflicts of interest, loss, waste, bribery, theft or fraud
- enable the Trustees to be in proper financial control of the Olive Tree
- enable the Olive Tree to meet the contractual obligations and requirements of funders
- ensure that financial reporting is robust, of sufficient quality and timely
- ensure that the trustees comply with charity law and regulation relating to finance.

3.3 Fundraising activities

Key donations and grants received in 2021/2022

The provision of our services is entirely dependent upon funding made through charitable donations and grants.

The Olive Tree's promise to the general public, our community and to our valued supporters, staff and volunteers, is that our fundraising is, in all its forms, legal, open, honest, and respectful. We take every reasonable step necessary to comply with the law and are fully responsible for our actions, ensuring that our fundraising is carried out in line with the Code of Fundraising Practice. We make sure that all of those who fundraise on our behalf do likewise and, as such, do not cause detriment to the charity's reputation. We also verify that all such fundraising activities are in-line with both our ethical standards and legal requirements.



Helena Taylor
Fundraising Manager

The Olive Tree, in deciding whether to accept a donation or gift, considers the charity's best overall interest, and will refuse donations from donors whose activities appear to be in direct conflict with any of our charitable aims or objectives.

Supporters who wish to donate to a specific area of the Olive Tree's work can do so by providing written instruction to this effect with their donation. The Olive Tree will always respect this. If the Olive Tree is unable to accept such a request, then the donation is refused or refunded if the sponsor does not wish the money to be used for a suitable alternative purpose.

Fundraising Performance

Following her appointment in January 2022, our Fundraising Manager, Helena Taylor, has sought funding from a wide variety of sources and fundraising opportunities throughout the reporting year, despite the ongoing negative impacts of the pandemic, as well as socioeconomic issues and has overseen a healthy income stream. We would like to thank The Henry Smith Charity for their continued support in sponsoring this position again this year.

We greatly appreciate the efforts and generosity of all who have contributed to our funds over the past year. Our overall income in 2021/22 from all sources (excluding investment income) was £184,226.

We gratefully received grants from The Sussex Community Foundation, Albert Hunt, Tesco Groundworks and The Longley Trust. We would also like to thank the Marsh Charitable Trust for their financial support, and express our gratitude for the kind and generous bequests received in the year; in particular the large amount bequeathed by the late June Scott. In these toughest of times, every contribution we receive makes a significant difference.

Olive Tree in the Community

Many of our volunteers and supporters have continued to raise money through their own initiatives. We are extremely proud of them and sincerely grateful for their exceptional efforts. These include organisations such as Trailblazers, RAM Cricket Club and Crawley Town Old Boys, who have each helped

raise large sums that have proved integral to our ability to support our patients. Also, we thank both the team at the Leacroft Medical Practice for the sponsorship funds they raised in completing the Gatwick Run race, and the friends of the late Nigel Bailey for the monies raised in the “marathon pool weekender” event staged in his memory.



We cautiously reintroduced some in-person fundraising activities in the community in 2022. This included match day collections at Crawley Town Football Club, and our presence at the RAM Cricket Club tournament in July 2022. Our thanks to all of the volunteers who took part. We thank both of these community partners for their continued generous support.



We have been chosen as the Charity of the year by B&CE People's Pension and thank them for their generous support to date.



It has been a pleasure working with Global4Communications.

The amazing efforts of their employees have resulted in raising substantial funds. We were particularly impressed by their Horsham to the Sussex coast sponsored walk and are so grateful for the funds they raised.

We would also like to thank Hermes for their generous donation and The Hornbrook pub (Hall & Woodhouse) for their fundraising efforts.

All the income received has so far proved vital in our ongoing provision of services, continuing to help improve the lives of our many users affected by cancer, and has helped us build a necessary financial buffer to secure the delivery of our services for the foreseeable future.

Engagement with our donors

Donor retention and development continues to be most important for the Olive Tree in order to ensure the sustainability of funding. We are committed to a continuous improvement of our donors' experience by targeting our communications with them. This way we learn more about their expectations, award criteria and key drivers of their loyalty, and achieve this through the provision of funding progress reports, end of funding reports, and by regularly meeting with our funders and supporters.

Looking Forward

Ongoing, our fundraising challenge will become greater. The demands for our support and care will grow, and this, together with the expansion of our Horsham service offerings, will mean that our costs will increase and with this, our fundraising will need to scale up accordingly. To date, this has proved to be very challenging. There is greater competition for the grants and community funds available to us. What's more, the combined effects of the tightening of household purse strings owing to cost of living increases, and new/urgent causes for donation (e.g., victims of the war in Ukraine, homelessness, food banks, Turkish earthquakes) makes our ambition even more difficult to deliver. Indeed, recent research conducted by Macmillan (February 2023) demonstrates that those suffering from cancer have been hit harder financially, in particular by the recent cost of living increases. This is likely to have a significant negative impact on the donations that we receive from patients in our centres.

3.4 Stakeholder management and communications

Engagement with our stakeholders remains a high priority for the Olive Tree and is a means of advising us of the impacts of our decisions and enabling us to better respond to their needs. The development and building of strong relationships with each of them is an important, ongoing part of our charity operations and governance.

Our key stakeholders are below:



All Trustees and management are committed to being open and transparent with the charity regulators and to meeting all of the Small Charity compliance requirements. A thorough and up-to-date understanding of legislation affecting the Olive Tree such as Charity Commission regulatory reporting (changes to SORP, best practice guides, new Trustee information) and forums for Trustees and Staff is core to ensuring that all decisions conform to the relevant guidance and constraints.

Ongoing provision of feedback and testimonials from the users of the Olive Tree are integral to the continuous shaping and improvement of services. As a minimum, we conduct a service user satisfaction survey every three years and issue a new user satisfaction survey on an annual basis.

We actively use a range of communication channels in order to keep our service users informed. For example, we issue a monthly update newsletter from the Centre management team, we extend an invitation to attend the AGM, and we circulate our Annual Report to members. We aim to further increase our usage of social media platforms such as LinkedIn, Facebook, Instagram and Twitter and to proactively engage further with these channels through our recently appointed Communications Administrator (Charlotte Hawkins). These platforms allow us to freely engage with our supporters and those interested in our work by publishing our latest news, details of our fundraising events and campaigns, and up to date information regarding our service provision.

We are extremely grateful to our grant providers (donors) because, as a self-funded charity, without them the Olive Tree would struggle to survive. We engage with each of these on an individual and tailor-made basis, and ensure that their required funding reports, both interim and at the end of funding, are submitted in a complete and timely manner.

Engagement with the local community (such as Crawley Local Community Network and Local Cancer Network), the general public and media through various community fundraising events, other Centres (Horizon in Brighton, Age UK in Horsham and Horsham District Council Wellbeing Centre), and meetings with local GP practices promoting the Olive Tree, remain a priority.

4. Financial report

4.1 The Financial Review 2021/2022

Treasurers report

The charity has built a strong financial position, with an exceptional level of income. This provides an excellent buffer for 2022/23, in which it faces significant fundraising challenges, and an increased cost base, following the expansion of operations in Horsham.

The surplus for the year was £76,841, following a surplus of £17,242 in the prior year. That surplus, however, arose almost entirely as a result of the bequest from the Estate of June Scott Aird. Details of the surplus can be found on page 24 of this report. Our reserves take account of the long-term nature of our operations and the needs of our service users. We plan to keep them at the level required in the Reserves Policy, fully taking account of the wide range of risks to which the charity is exposed. The self-funding nature of the charity presents significant reliance on income received, with inherent volatility. Outgoings, by contrast, comprise items such as staff costs, premises, IT, therapy and volunteer expenses which are stable and, in many cases, unrelated to activity levels.

Income

The primary sources of income are donations, fundraising activities and legacies, together with certain grants for specific purposes. Income received in the year was £184,226 (inclusive of interest), up from £114,935 in the prior year. The increase includes a bequest from the Estate of June Scott Aird of £75,716, and increases in external donations, both from individuals and corporates, partially offset by a reduction in donations received within the centre and the end of the CJRS (furlough) scheme.

Expenditure

Expenditure for the year was £107,385, up from £97,693 in the prior year. The increase of £9,692 was primarily from increases in drop-in, therapy and admin costs following the resumption of services, and premises costs following increased Horsham activity. These expenses remain below pre-pandemic amounts, in line with activity levels, but will increase considerably with the opening of the new centre at Lavinia House in Horsham.

Financial Impact

With the pandemic largely behind us, activity in the centre has increased considerably but is yet to fully return to pre-pandemic levels. We currently have a significant waiting list for our services and expect that the new facilities opened in Lavinia House, together with the drive to recruit additional volunteer therapists and counsellors, will enable us to address that list. This will, of course, further increase the drop-in and therapy expenses.

Financial Outlook

This year the Olive Tree has been extremely fortunate to receive a generous bequest, without which there would not have been a surplus. In addition, the funding for the Macmillan Support Worker has now ended, although the post and associated costs will continue. Without these items of income, the charity would have incurred a considerable deficit.

The expense base will also be increasing, with the opening of the centre at Lavinia House, and the employment of an additional member of staff, commencing in 2023, due to the increased workload. The strong level of reserves held at the start of 22/23 will provide a financial buffer as the new set-up and its associated additional cost takes effect.

Restricted Funds

Restricted funds comprise amounts received for a specific purpose. Such funds are monitored to ensure they are only applied for the purpose specified, and any balance of such funds is recorded separately.

	£
Funds b/fwd	18,118
Income Received	41,149
Expenses Paid	(43,861)
Funds c/fwd	£15,406

Horsham Information Hub. A grant of £25,590 was received specifically in respect of the Horsham Information Hub. Related expenditure amounted to £24,106. In addition, a balance of £1,057 was carried over from the previous year, leaving a surplus of £2,541 at the end of the period.

Horsham Services. A further grant of £8,959 was received specifically in respect of the Horsham Therapy Centre, in addition to the £8,271 held at the beginning of the period. Expenditure of £6,780 has been incurred in the financial year, leaving a balance carried forward of £10,450. These grants continue to be expended in the current financial year, with expenditure increasing greatly following the opening of the new centre in Lavinia House.

Counselling Grant. Grants of £6,975 in respect of counselling supervision costs were held at the start of the year. Counselling activities have been building up since the pandemic restrictions were relaxed, with expenditure of £4,875 during the year, leaving a balance of £2,100 at the end of the year. The entire balance has been fully expended at the date of this report.

Fundraising Officer. A grant was received from the Henry Smith Charity in the amount of £6,600 to support the role of Fundraising Officer. The grant received has been fully expended with no amounts being held over.

Reserves held

Unrestricted reserves, comprising that part of a charity's unrestricted funds that are freely available to spend on any of the charity's purposes, were £281,082, increasing from £201,529 for the prior year, are in line with the reserving policy (below) and follow the surplus of income over expenditure detailed on page 24, adjusted for the movement in restricted funds. Details of funds invested are included on page 25.

Risk management and reserves

The Trustees undertake regular assessments and, where appropriate, systems or procedures have been established to mitigate the risks the charity faces. These inform the Trustees' consideration of an appropriate target range for reserves.

Reserves targets are calculated by reference to the forward financial outlook and the risks facing the charity, with the aim of ensuring that key services are sustainable, and that early action can be taken to deal with matters as they arise.

Reserves Policy

The Trustees set, publish, implement and monitor the Reserves Policy in line with the guidance provided by the Charities Commission in England and Wales, "Charity Reserves and Building Resilience" (CC19) to ensure compliance with their legal duties to:

- act in the interests of their charity and its beneficiaries
- protect and safeguard the assets of their charity
- act with reasonable care and skill
- ensure their charity is accountable.

The Trustees have reviewed the financial risks facing the organisation (see Risk Management section) and quantified both the probability and magnitude of those risks. The Trustees have resolved as a policy to set both an upper and a lower limit of unrestricted reserves to be maintained for such purposes, and to act to increase or decrease expenditure if the reserves fall outside those limits. At the date of the approval of this report by the Trustees, the target range of reserves was £193,000 to £290,000 (2021: £176,000 to £264,000). The increase in the target range follows an increase in the fundraising challenges seen across the sector, arising from the effect of the UK economic situation on disposable income, and international crises such as those in Ukraine and Turkey drawing huge charitable donations away from UK charities generally. This has reduced the grants and donations available more widely in the charity sector, greatly increasing competition for the funding. In addition, the price pressures and shortages arising globally are expected to increase the expense base of the Olive Tree, placing further pressure on reserves.

Actual unrestricted reserves at £281,082 (2021: £201,529) are within the target range. The aforementioned income and price pressures have reduced total reserves by more than £65,000 and unrestricted reserves by over than £50,000 in the 6 months since the year end, to £230,705 at the end of February 2023.

Large Donations, Grants and Bequests

Significant amounts were received from:

Estate of June Scott Aird (Bequest)	£75,716
Macmillan	£25,590
Sussex Community Foundation	£8,959
Hermes Parcelnet Limited	£6,720
The Henry Smith Charity	£6,600
The Albert Hunt Trust	£5,000
Global 4 Communications*	£2,810
Karen Keating Foundation	£2,000

* Please note that this amount was received directly from Global 4 Communications as a matched contribution and is in addition to an equivalent sum raised by its staff through sponsorship.

Fundraising donations via JustGiving were £10,380.

Independent Examiner

Ian Lineham was re-appointed as independent examiner to Olive Tree Cancer Support Group during the year and has expressed their willingness to continue in that capacity.

Approved by the trustees on 7 June 2023 and signed on their behalf by



Trevor Christmas
Trustee

4.2 Report of the Independent Examiner

Independent Examiner's Report to the Trustees of the Olive Tree Cancer Support Group, registered charity 1157386

I report to the Trustees on my examination of the accounts of the Olive Tree Cancer Support Group ("the Charity") for the year ended 31 August 2022 set out on pages 24 to 25.

Responsibilities and basis of report

As the Trustees of the Charity, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

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

- accounting records were not kept in accordance with section 130 of the Act; or
- the accounts do not accord with the accounting records.

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



Ian Lineham
Chartered Accountant
Institute of Chartered Accountants in England and Wales
4 Gander Hill,
Haywards Heath,
West Sussex
RH16 1QX

Date

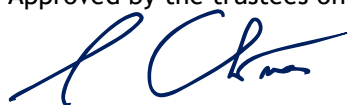
7/6/23

4.3 Income and Expenditure Account

Year ended 31 August 2022

	2022	2021
	£	£
Income		
Fundraising and Donations	38,467	19,798
Grants <i>including Macmillan</i>	49,149	52,420
Covid-19 related grants <i>including CJRS</i>	478	19,163
Bequests	81,966	12,000
Drop-in and Therapy Donations	9,722	4,891
Events	2,981	5,213
Total Operating Income	182,763	113,485
Interest	1,463	1,450
Total Income	184,226	114,935
Expenditure		
Staff Costs	66,242	69,942
Drop-in and Therapy expenses	11,644	7,007
General Expenses	18,824	13,794
Equipment	413	168
Premises (Horsham)	7,796	4,628
Fund Raising	620	906
Advertising and Awareness	1,347	1,002
Training	499	246
Total Expenditure	107,385	97,693
Excess of Income over Expenditure	76,841	17,242
Opening Funds	219,647	202,405
Closing Funds	296,488	219,647
Reserves		
At 31 August		
Cash at Bank	296,488	219,647
Restricted Funds	(15,406)	(18,118)
Unrestricted Reserves	281,082	201,529

Approved by the trustees on 7 June 2023 and signed on their behalf by



Trevor Christmas
Treasurer

Notes to the Financial Statements

The Trust had funds at 31 August 2022 of £296,488 (2021: £219,647) which were invested as follows:

	2021/22	2020/21
	£	£
CAF Cash Account (current account)	16,684	9,645
CAF Gold Account (immediately available)	30,000	41,000
CAF Gold (Direct Donations, immediately available)	55	new account
Cambridge and Counties (95 days' notice)	80,134	new account
Redwood Bank (95 days' notice)	84,615	83,680
Saffron Building Society (immediately available)	85,000	85,322
	296,488	219,647

THE OLIVE TREE CANCER SUPPORT GROUP CONTACT DETAILS

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