

**Supporting patients and staff**



# Annual Report and Accounts 2024-2025

[/get-involved/charitable-funds](#)

“

I was hugely proud to officially take on the role as Head of Charity of the Isle of Wight NHS Trust Charity in 2024. Working alongside Portsmouth Hospitals Charity, as our respective Trusts work in partnership I hope will present us with many opportunities in the future.

I love visiting St Mary’s and seeing the difference the charity has already made. I’ve also been particularly proud of the way we have already introduced some initiatives which have already been a success across the Solent!

Enhancing patient care, and supporting staff welfare will be our priority. We will also support the Isle of Wight Ambulance Service who are an important part of the Isle of Wight NHS Trust. Looking forward to the future!

”

Kate Sandys  
Head of Charity

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# Message from the Chair

“As I take over as the new Chair of the Isle of Wight NHS Trust Charity, I am delighted to see the difference the Charity is making already across St Mary's hospital. I am also hugely excited for the future and playing my part in its ongoing success.”

I am delighted to introduce to you the Annual Report for the Isle of Wight NHS Trust Charity for the year ended 31 March 2025.

As I take over as the new Chair of the Isle of Wight NHS Trust Charity, I am delighted to see the difference the Charity is making already across St Mary's hospital. I am also hugely excited for the future and playing my part in its ongoing success.

Following the partnership between Portsmouth Hospitals University NHS Trust and the Isle of Wight NHS Trust, the charity, although maintaining a separate registration is now able to share some resource with Portsmouth Hospitals Charity. As a result, in June 2024, the charity hosted a relaunch on site which was a great success.



**Jenni Douglas-Todd**  
Chair of Charity Board of Trustees

Some new income generation initiatives launched by the charity in 2024 were the sale of branded fleeces for staff, as well as our first event, a Santa Dash in Cowes! There are many more opportunities which we are working on which we hope will seek to increase our income, and our impact in years to come.

In 2024/25, £84,000 was spent on improving patient care and staff welfare. We introduced the first 'Dragon's Den' inviting all staff to submit project ideas. We were really pleased with the results, and you can read more about these on pages 10 and 11. We also supported the Staff Awards, which we are always proud to be associated with.

Finally, I would like to pass my thanks on to you, and all of our supporters who fundraise to help enhance patient care alongside our charity. Thanks must go to the Friends of St Mary's volunteers who run the shop just inside the reception. Every year they raise money to support the charity with lots of different initiatives, and we are so grateful for their ongoing commitment.

We have exciting times ahead, but we couldn't achieve anything without your kind donations.

With best wishes,

A handwritten signature in black ink, appearing to read 'Jenni Douglas-Todd'.

Jenni Douglas-Todd



Supporting patients and staff

Supporting...

Isle of Wight NHS Trust

Supporting...

Our year  
in numbers



@IOWNHScharity



[iow.nhs.uk/get-involved/charitable-funds](https://www.iow.nhs.uk/get-involved/charitable-funds)

2020

## Income



**Donations**  
£65,059



**Legacies**  
£6,180



**Other income**  
(including grants received)  
£5,515



**Investment income**  
£14,835

## Expenditure



**Patient welfare  
and amenity**  
£73,065



**Staff welfare  
and amenity**  
£11,409

### INCLUDING:

**Working Together**  
£30,826

**ITU** £16,222

**Stroke Services**  
£7,780

**Women & Children**  
£4,816



# Your support: Enhancing patient care

Throughout 2024-25, your generous donations allowed us to fund a wide range of projects that enhance patient care and staff wellbeing across the Trust.

As shown in this report, a lot of the changes made have gone towards the Children's Department, a department where our youngest and sometimes most vulnerable patients need help the most!

## 32" Smart TV

Another addition to the Children's Department that the charity made was a brand new 32" Smart TV. The TV was installed to make children's stays in hospital more comfortable and less scary.

**Dionne Davies, one of our Play Specialists, said "we are incredibly grateful to the charity for kindly providing the television, which has made a real difference for our children and young people during their hospital stays. Being able to connect it to the PlayStation has brought much-needed entertainment and comfort during what can often be long and difficult admissions."**

## iPad for the Children's Department

One of the things the Charity have funded for the Children's Department is an iPad, which can be taken around the department for children who need it.

The introduction of the iPad has had a positive impact on children who come to the department, helping to provide distraction and comfort when needed most.

**"The iPad has been a great success on the children's ward for distraction during medical procedures. We predominately use it during blood tests or cannulations on the ward or in theatre. Although it has been used for children with additional needs to watch their favourite YouTube programmes. This creates a calm, engaged child who is focused on fun rather than a potentially painful procedure.**

**A simple app like making ice-creams or stacking pancakes can reduce anxiety, promoting resilience and coping strategies for the next medical intervention.**

**Many thanks to the charity for this amazing addition to the children's ward – it's helped so many children during challenging treatments!**

- Dionne Davies, Play Specialist

**"**



## Pupilometer

We were able to provide the Intensive Care Unit with a brand new pupilometer.

This was made possible thanks to the incredible generosity of our fundraisers and those who have donated to the Charity.

Pupilometers offer fast, accurate and non-invasive measurements of pupil size and reactivity which can be crucial in diagnosing and monitoring patients with head injuries, strokes or other neurological conditions.

**Becky Craig, ICU Sister, said "The team are looking forward to completing their training and using the new piece of equipment that will help us monitor the neurological status of our patients."**

Staff from the Children's Department with the gaming carts donated at Christmas - pictured **above left** and ICU staff with the pupilometer - pictured **above right**

## Children's Department Gaming Carts

Christmas is the time for giving and giving to Charity is one of the best ways to help others during the festive period. This past Christmas, Gamer Reach Charity gave a generous donation of not one, but TWO gaming carts for our Children's Department!

Hospital visits can often be daunting and stressful for children, especially when they face extended treatments or procedures. These gaming carts, equipped with a variety of popular video games, offer a fun and engaging way to help take their minds off medical challenges, reduce anxiety, and make their time in hospital more positive.

Beyond just entertainment, playing games can also encourage cognitive development and emotional well-being, all of which are incredibly important to a child's overall healing process. The gaming carts mean that gaming can be easily brought to bedsides, playrooms, or treatment areas, ensuring accessibility for children with varying levels of mobility.

**Dionne Davies, one of our Play Specialists, said "The staff and I are pleased as punch with the gaming carts. They are going to be really popular and bring a lot of joy to children as they recoup from their illness."**

**"We are so grateful to Marie and the local community for working so hard to raise funds for us to purchase the pupilometer for our ICU here at St Mary's Hospital. It is a very generous gift and will help enhance diagnostics within the ICU.**

- Becky Craig, ICU Sister

**"**



# Supporting staff welfare

## PALS Office

Another one of our Dragon's Den's 2024 projects looked at renovating the PALS office.

With the number of walk-ins into the PALS office increasing, it was decided that the seating and tables desperately needed replacing. A fridge was also requested in order to have a place for staff to keep their lunches, as well as milk and water for visitors.

Thanks to donations and fundraising, the PALS office received new furniture and a new fridge on order to enhance the area for staff and walk-in visitors!

**Samantha Johnson, our Patient Experience Lead, said “The staff who had previously been in or used the PALS office have mentioned how lovely the new furniture looks compared to the old.”**



**Left:** The fridge for the staff in the PALS office



**Centre:** The left side of the PALS office



**Right:** The right side of the PALS office

## Maintenance Break Room

As part of our Dragon's Den 2024 projects, we looked at renovating the Maintenance Break Room for the Estates team.

The project looked at procuring new seating and furniture, as well as replacing the kitchenette, flooring and repainting the walls to give the room more light, due to there not being very many windows.

The redecoration and renovation of the Maintenance Break Room has provided the maintenance team with a brighter, cleaner atmosphere. It has also created a more comfortable and usable space for the maintenance team to use during their rest period.



“ We were delighted to run our first ‘Dragon’s Den’ at St Mary’s to invite project ideas for funding from staff. We can really see the difference these projects have made to both patients and staff alike.  
- Kate Sandys, Head of Charity

”



# Thanks for your support!

We want to thank everyone who gave to Isle of Wight NHS Trust Charity last year, whether it be financially, with gifts in kind, or with your time. We can't thank you enough. We can't mention everyone, but we are so grateful to everyone who gave us their support.

## Community Groups

DVLA  
Newport IOW Lions Club  
Electrical Solution Ltd  
Clarkes Mechanical Ltd  
Tyler Robert (IOW)  
Ickle Pickles  
Masonic Lodge  
Smile Publications  
Plaza Ices  
Wightfibre  
Parkinsons Exercise Group

# Gifts in wills: thank you!

Thank you to the **3 generous supporters** who kindly left a gift in their will which we received in 2024-25, totalling an incredible **£6,180**.

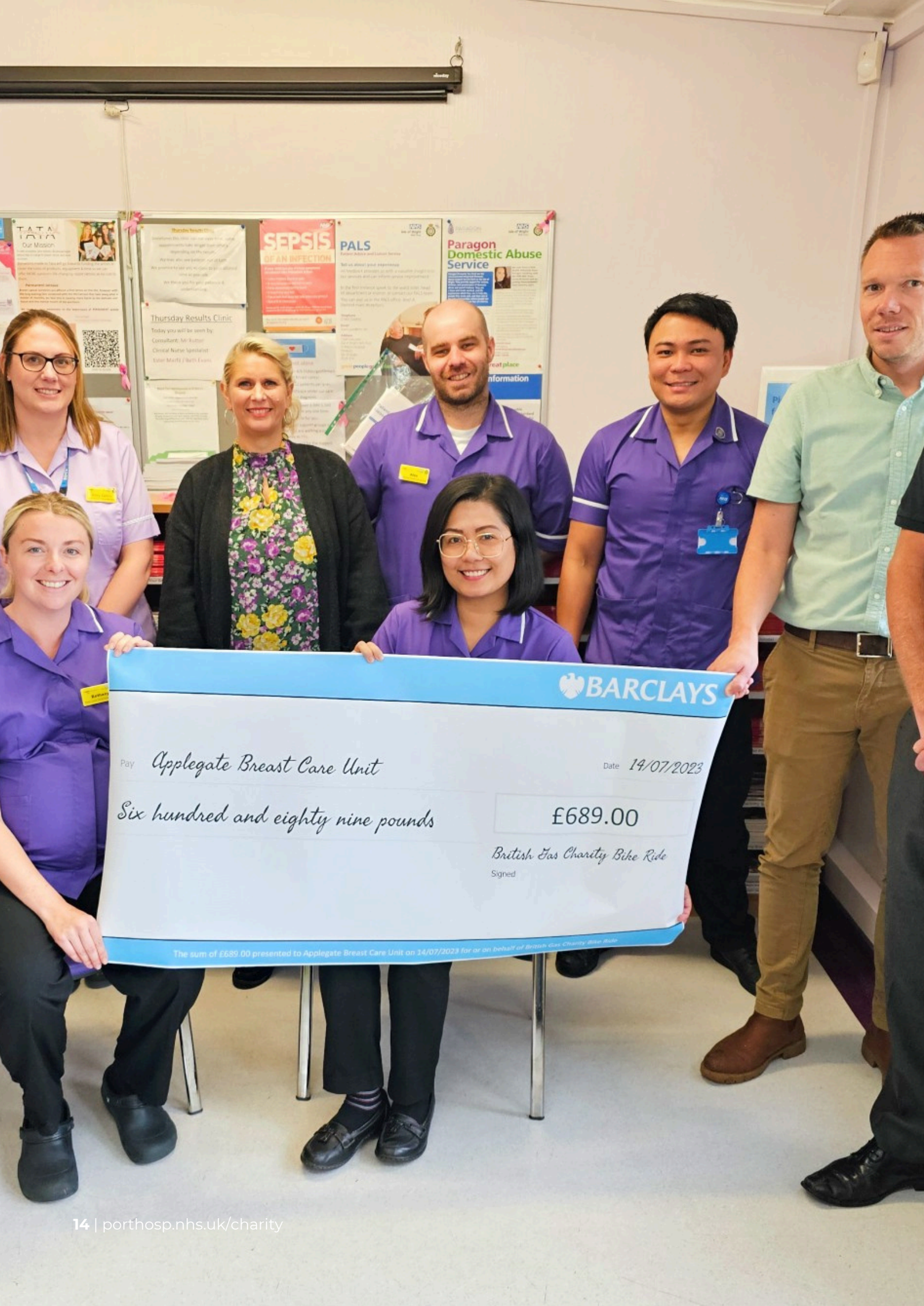
These gifts are so special and crucial in enabling the Charity to continue to support enhancements for patients and staff wellbeing.





# Financial review

## ANNUAL ACCOUNTS 2024/25





Finance Review

The net assets of the Charity as at 31 March 2025 were £330,000 (compared with £362,000 on 31 March 2024). This is a decrease of £32,000 during the year.

The General (Unrestricted) Fund decreased by £6,000 to £45,000, the designated funds increased by £1,000 to £145,000 and the restricted funds decreased by £27,000 to £140,000.

During 2024/25, the Charity received a total income of £91,000 a decrease of £134,000 on the previous year.

Expenditure during 2024/25 totalled £123,000 a decrease of £54,000 from the previous year. Patient welfare and amenities benefitted from expenditure of £73,000

Reserves and Investments

The Charity Board has established a reserves policy. We have agreed that the level of the reserves should be a minimum of £200,000, which is equal to approximately one year's operational costs and estimated annual commitments. This amount can be revised at any time according to relevant circumstances.

The Charity's total reserves stand at £330k and are calculated as follows:

Unrestricted Reserves – General Fund	£ 45,000
Unrestricted Reserves – Designated Fund	£ 145,000
Restricted Reserves	£ 140,000
Total Reserves	£ 330,000

The Charity Board will make every effort to spend designated funds within a reasonable period of receipt. Designated funds not spent within a reasonable period are reviewed and the likelihood that funds will be committed soon considered. Where the designated funds are no longer required, the fund will be closed and transferred to reserves. The Charity expects to utilise as much of the available funds as possible in furtherance of its objectives

Cash is held within the Charities Official Investment Fund (COIF) specifically designed for charities which obtains a competitive investment income return during the year.The movement in interest rates affects the income received.

Risk Management

As part of the business planning for the Charity, the Charity Board has considered the major risks to which the Charity is exposed. It has reviewed systems and identified steps to mitigate the major risks to which the Charity is exposed

Partnership Working

We remain indebted to the work of the volunteers of the Isle of Wight Friends of St Mary's, who raise thousands of pounds each year for St Mary's Hospital and to the many members of staff who give up much of their spare time to fund raise. On behalf of the staff and patients who have benefited from improved services due to donations and legacies, the Charity Board would like to thank all patients, relatives and staff who have made charitable donations.

Future Plans

The aims and objectives for the next twelve months are to continue to work to deliver on our four-year strategy. The Charity will reach the end of this strategy in 2028 so will be resetting our aims. This will involve stakeholder engagement and approval by the Charity Board of Trustees.

For 2025/26, the team will deliver against three key priority aims as follows:

- Enhancing patient care
- Supporting staff well being
- Advancing medical research

In addition to these, three supporting goals have been added as follows:

- Growing support
- Growing our influence
- Effective organisation



Personal  
ongings are  
ought in at  
e patients  
own risk.



Statement of trustee’s responsibilities

The Corporate Trustee is responsible for:

- keeping proper accounting records which disclose with reasonable accuracy at any time the financial position of the funds held on trust and to enable them to ensure that the accounts comply with requirements in the Charities Act 2011 and those outlined in the directions issued by the Secretary of State;
- establishing and monitoring a system of internal control; and
- establishing arrangements for the prevention and detection of fraud and corruption.

The Corporate Trustee is required under the Charities Act 2011 and the National Health Service Act 1977 to prepare accounts for each financial year. The Secretary of State, with the approval of the Treasury, directs that these accounts give a true and fair view of the financial position of the funds held on trust, in accordance with the Charities Act 2011. In preparing those accounts, the trustees are required to:

- apply on a consistent basis accounting policies laid down by the Secretary of State with the approval of the Treasury;
- make judgements and estimates which are responsible and prudent;
- state whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the accounts; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention or detection of fraud and other irregularities


The Corporate Trustee confirms that they have met the responsibilities set out above and complied with the requirements for preparing the accounts. The financial statements set out on pages 20 to 35 attached have been compiled from and are in accordance with the financial records maintained by the trustees.

By Order of the Trustee -

Signed:



Chair  
Jenni Douglas-Todd  
Date: 28.11.25



Trustee  
Penny Emerit  
Date: 28.11.25

Independent Examiners Report to the Trustee of Isle of Wight NHS Charity

Independent examiner’s report to the trustee of Isle of Wight NHS Charity

I report to the trustee on my examination of the accounts of the Isle of Wight NHS Charity (the Charity) for the year ended 31 March 2025.

Responsibilities and basis of report

As the charity trustee 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 Charity's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all 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 giving me cause to believe that in any material respect:

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

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



Adam Fullerton FCA DChA  
For and on behalf of Moore Kingston Smith LLP  
9 Appold Street  
London  
EC2A 2AP

Date: 2 December 2025

Statement of Financial Activities for the year ended 31st March 2025

	Note	Unrestricted Funds £'000	Restricted Funds £'000	Total Funds 2024/25 £'000	Total Funds 2023/24 £'000
<b>Income and Endowments from:</b>					
Donations and Legacies	4	68	3	<b>71</b>	134
Other Trading Activities		4	0	<b>4</b>	0
Investment Income	6	9	6	<b>15</b>	13
Other		1	0	<b>1</b>	78
<b>Total Incoming Resources</b>		<b>82</b>	<b>9</b>	<b>91</b>	<b>225</b>
<b>Resources Expended:</b>					
Raising Funds	7	5	16	<b>21</b>	22
<b>Charitable Activities</b>					
Patient Welfare and Amenity	8	61	12	<b>73</b>	104
Staff Welfare and Amenity		10	0	<b>10</b>	22
Staff Education - Courses & Resources		1	0	<b>1</b>	29
Other	9	10	8	<b>18</b>	0
<b>Total Resources Expended</b>		<b>87</b>	<b>36</b>	<b>123</b>	177
<b>Net (outgoing)/incoming resources before transfers</b>					
		(5)	(27)	(32)	48
Transfers:- Gross transfers between funds	19	0	0	<b>0</b>	0
<b>Net (outgoing)/incoming resources before other recognised gains and losses</b>					
		(5)	(27)	<b>(32)</b>	48
<b>Net Movement in Funds</b>					
		(5)	(27)	<b>(32)</b>	48
<b>Reconciliation of Funds</b>					
Fund balances brought forward from previous year		195	167	<b>362</b>	314
<b>Fund Balances carried forward</b>		<b>190</b>	<b>140</b>	<b>330</b>	362

The notes at pages 22 to 35 form part of this account.

Balance Sheet as at 31st March 2025

	Note	Unrestricted Funds £'000	Restricted Funds £'000	Total 31 March 25 £'000	Total Funds 23/24 £'000
<b>Fixed Assets</b>					
Investments	14	164	121	<b>285</b>	285
<b>Total Fixed Assets</b>		164	121	<b>285</b>	285
<b>Current Assets</b>					
Debtors	15	13	10	<b>23</b>	45
Cash at bank and in hand	16	34	40	<b>74</b>	79
<b>Total Current Assets</b>		47	50	<b>97</b>	124
<b>Liabilities</b>					
Creditors: Amounts falling due within one year	17	21	31	52	<b>47</b>
<b>Net Current Assets</b>		26	19	45	77
<b>Total Assets Less Current Liabilities</b>					
		190	140	<b>330</b>	<b>362</b>
<b>Funds of the Charity</b>					
Restricted Income Funds		0	140	<b>140</b>	<b>167</b>
Unrestricted Income Funds		190	0	<b>190</b>	<b>195</b>
<b>Total Charity Funds</b>		190	140	<b>330</b>	<b>362</b>

The notes at pages 22 to 35 form part of these accounts.

Signed: Penny Emerit

Date: 28.11.25





Statement of cash flows for the year ending 31st March 2025

	Notes	Total Funds 24/25 £'000	Total Funds 23/24 £'000
Cash flows from operating activities:			
Net cash provided by (used in) operating activities	18	(20)	26
Cash flows from investing activities:			
Dividends, interest and rents from investments		15	13
Net cash provided by investing activities		15	13
Change in cash and cash equivalents in the reporting period			
Cash and cash equivalents at the beginning of the reporting period		79	40
Cash and cash equivalents at the end of the reporting period		74	79

Notes to the Accounts

1. Accounting Policies

(a) Basis of preparation

The financial statements have been prepared under the historic cost convention, with the exception of investments which are included at fair value.

The accounts (financial statements) have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) issued on 16 July 2014 and the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and the Charities Act 2011 and UK Generally Accepted Practice as it applies from 1 January 2015.

The Corporate Trustee considers that there are no material uncertainties about the IOW NHS Trust Charitable Funds ability to continue as a going concern. There are no material uncertainties affecting the current year's accounts.

In future years, the key risks to the Charity are a fall in income from donations.

The Charity is a public benefit entity.

b) Structure of funds

Where there is a legal restriction on the purpose to which a fund may be put, the fund is designated in the accounts as a restricted fund. Funds where the capital is held to generate income for charitable purposes and cannot itself be spent are accounted for as endowment funds. Other funds are classified as unrestricted funds. Funds which are not legally restricted but which the Trustees have chosen to earmark for set purposes are designated funds. The major funds held in these categories are disclosed on notes 20.1 and 20.2.

Notes to the Accounts - continued

c) Incoming Resources

a) All incoming resources are included in full in the Statement of Financial Activities as soon as the following three factors can be met:

- entitlement - arises when a particular resource is receivable or the charity's right becomes legally enforceable;
- certainty - when there is reasonable certainty that the incoming resource will be received;
- measurement - when the monetary value of the incoming resources can be measured with sufficient reliability.

b) Legacies

- Legacies are accounted for as incoming resources once the receipt of the legacy becomes reasonably certain. This will be once confirmation has been received from the representatives of the estates that payment of the legacy will be made or property transferred and once all conditions attached to the legacy have been fulfilled.

c) There are no unfulfilled conditions or other contingencies attaching to resources from non-exchange transactions that have not been recognised in income.

d) Resources expended and irrecoverable VAT

The funds held on trust accounts are prepared in accordance with the accruals concept.All expenditure is recognised once there is a legal or constructive obligation to make a payment to a third party.

Irrecoverable VAT is charged against the category of resources expended for which it was incurred.

a) Cost of generating funds

- The cost of generating funds are the costs associated with generating income for the funds held on trust.

b) Grants payable

- Grants payable are payments, made to third parties (including NHS bodies) in the furtherance of the funds held on trust's charitable objectives to relieve those who are sick. They are accounted for on an accruals basis where the conditions for their payment have been met or where a third party has a reasonable expectation that they will receive the grant. This includes grants paid to NHS bodies.

c) Support Costs

- These are accounted for on an accruals basis and are recharges of appropriate proportions of the costs from the Isle of Wight NHS Trust, apart from the audit fee.

e) Fixed Assets

The only fixed assets that the Fund has are investments assets.

f) Investment Fixed Assets

Investment fixed assets are shown at market value. Other investment fixed assets are included at trustees' best estimate of market value.

g) Debtors

Debtors are amounts owed to the Charity. They are measured on the basis of their recoverable amount.

h) Cash and cash equivalents

Cash at bank and in hand is held to meet the day to day running costs of the charity as they fall due. Cash equivalents are short term, highly liquid investments, usually in 90 day notice interest bearing savings accounts.

i) Creditors

Creditors are amounts owed by the Charity. They are measured at the amount the Charity expects to have to pay to settle the debt.

Amounts which are owed in more than a year are shown as log term creditors.

j) Realised gains and losses

All gains and losses are taken to the Statement of Financial Activities as they arise. Realised gains and losses on investment are calculated as the difference between sales proceeds and opening market value (or the value at date of purchase if later). Unrealised gains and losses are calculated as the difference between market value at the year end and opening market value (or value at date of purchase if later).



Notes to the Accounts - continued

k) Value Added Tax (VAT)

No income is generated by the charity which includes VAT. Purchases made by the charity are subject to VAT. Purchases of a medical nature are liable to zero rated VAT when purchased by the charity and VAT zero rated certificates are sent when ordering these goods. Irrecoverable VAT is charged against the category of resources expended for which it was incurred.

2. Prior year comparatives by type of fund

2.1 Unrestricted Funds - Statement of Financial Activities for the year ended 31 March 2025

	Total Funds 2024/25 £'000	Total Funds 2023/24 £'000
<b>Income and Endowments from:</b>		
Donations and Legacies	68	94
Charitable Activities	0	0
Other Trading Activities	4	0
Investment Income	9	7
Other	1	48
<b>Total Incoming Resources</b>	<b>82</b>	149
<b>Resources Expended:</b>		
Raising Funds	5	1
<b>Charitable Activities</b>		
<i>Patient Welfare &amp; Amenities</i>	61	78
<i>Staff Welfare &amp; Amenities</i>	10	16
<i>Staff Education - Courses &amp; Resources</i>	1	31
Other	10	0
<b>Total Resources Expended</b>	<b>87</b>	126
<b>Net (outgoing)/incoming resources before transfers</b>		
	(5)	23
Transfers:- Gross transfers between funds	0	4
<b>Net (outgoing)/incoming resources before other recognised gains and losses</b>		
	(5)	27
Other recognised gains and losses		
Gains on revaluation of fixed assess for charity's own use	0	0
Gains/losses on investment assets	0	0
Acturial gains/losses on defined benefit pension schemes	0	0
<b>Net Movement in Funds</b>		
	(5)	27
<b>Reconciliation of Funds</b>		
Fund balances brought forward from previous year	195	168
<b>Fund Balances carried forward</b>	<b>190</b>	<b>195</b>

Notes to the Accounts - continued

2.1 Unrestricted Funds - Balance Sheet as at 31 March 2025

	Total 31 March 2025 £'000	Total 31 March 2024 £'000
<b>Fixed Assets</b>		
Investments	164	155
<b>Total Fixed Assets</b>	<b>164</b>	155
<b>Current Assets</b>		
Debtors	13	15
Short term investments and deposits	0	0
Cash at bank and in hand	34	50
<b>Total Current Assets</b>	<b>47</b>	65
<b>Liabilities</b>		
Creditors: Amounts falling due within one year	21	25
<b>Net Current Assets</b>	<b>26</b>	40
<b>Total Assets Less Current Liabilities</b>	<b>190</b>	195
Creditors: Amounts falling due after more than one year	0	0
<b>Total Net Assets</b>	<b>190</b>	<b>195</b>

2.2 Restricted Funds - Statement of Financial Activities for the year ended 31 March 2025

	Total Funds 2024/25 £'000	Total Funds 2023/24 £'000
<b>Income and Endowments from:</b>		
Donations and Legacies	3	40
Charitable Activities	0	0
Other Trading Activities	0	0
Investment Income	6	6
Other	0	30
<b>Total Incoming Resources</b>	<b>9</b>	<b>76</b>
<b>Resources Expended:</b>		
Raising Funds	16	21
<b>Charitable Activities</b>		
<i>Patient Welfare &amp; Amenities</i>	12	26
<i>Staff Welfare &amp; Amenities</i>	0	6
<i>Staff Education - Courses &amp; Resources</i>	0	(2)
Other	8	0
<b>Total Resources Expended</b>	<b>36</b>	<b>51</b>
<b>Net (outgoing)/incoming resources before transfers</b>	<b>(27)</b>	<b>25</b>
Transfers:- Gross transfers between funds	0	(4)
<b>Net (outgoing)/incoming resources before other recognised gains and losses</b>	<b>(27)</b>	<b>21</b>
Other recognised gains and losses		
Gains on revaluation of fixed assess for charity's own use	0	0
Gains/losses on investment assets	0	0
Actuarial gains/losses on defined benefit pension schemes	0	0
<b>Net Movement in Funds</b>	<b>(27)</b>	<b>21</b>
<b>Reconciliation of Funds</b>		
Fund balances brought forward from previous year	167	146
<b>Fund Balances carried forward</b>	<b>140</b>	<b>167</b>

2.2 Restricted Funds - Balance Sheet as at 31 March 2025

	Total 31 March 2025 £'000	Total 31 March 2024 £'000
<b>Fixed Assets</b>		
Investments	121	130
<b>Total Fixed Assets</b>	<b>121</b>	<b>130</b>
<b>Current Assets</b>		
Debtors	10	30
Short term investments and deposits	0	0
Cash at bank and in hand	40	29
<b>Total Current Assets</b>	<b>50</b>	<b>59</b>
<b>Liabilities</b>		
Creditors: Amounts falling due within one year	31	22
<b>Net Current Assets</b>	<b>19</b>	<b>37</b>
<b>Total Assets Less Current Liabilities</b>	<b>140</b>	<b>167</b>
Creditors: Amounts falling due after more than one year	0	0
<b>Total Net Assets</b>	<b>140</b>	<b>167</b>

3 Related Party Transactions

The Isle of Wight NHS Trust as Corporate Trustee receives the majority of the benefit provided by Charitable Funds. However, the individual members have not undertaken any material transactions with the Isle of Wight NHS Trust Charitable Funds during the year.

There were no recharges for staff employed by Isle of Wight NHS Trust but as a result of the partnership with Portsmouth Hospitals University NHS Trust there were staff recharges totalling £11,061. of which £8,409 were funded within an NHS Charities together grant.

4 Income from donations and legacies

	Unrestricted Funds £'000	Restricted Funds £'000	Total 31 March 2025 £'000	Total 31 March 2024 £'000
Donations from individuals	56	0	56	89
Corporate Donation	9	0	9	9
Legacies	3	3	6	36
<b>Total</b>	68	3	71	134

5 Role of Volunteers

Lke all charities, the IOW NHS Trust Charitable Fund is reliant on many volunteers for their involvement in fundraising by way of organising, publicising or undertaking physical challenges to raise funds for all areas of the Trust. The volunteers consist of members of the public and employees of IOW NHS Trust.

In accordance with the SORP, due to the absence of any reliable measurement basis, the contribution of these volunteers is not recognised in the accounts.

6 Total gross Income from investments

	2025 Held in UK Total £'000	2024 Held in UK Total £'000
COIF Interest	15	13
<b>Total</b>	15	13

7 Analysis of expenditure on Raising Funds

	Unrestricted Funds £'000	Restricted Funds £'000	Support Costs £'000	Total 31 March 2025 £'000	Total 31 March 2024 £'000
Fundraising - other costs	4	4	1	9	22
Fundraising - staff costs	0	10	2	12	0
<b>Total</b>	4	14	3	21	22

8 Analysis of Charitable Expenditure

	Activities Undertaken Directly £'000	Grant Funded Activity £'000	Support Costs £'000	Total 31 March 2025 £'000	Total 31 March 2024 £'000
Patient Welfare & Amenities (inc. equipment)	0	66	7	73	104
Staff Welfare & Amenities	0	9	1	10	22
Staff Education - Resources	0	1	0	1	15
Staff Education - Courses	0	0	0	0	0
<b>Total</b>	0	76	8	84	141

9 Analysis of Other expenditure

	Unrestricted Funds £'000	Restricted Funds £'000	Total 31 March 2025 £'000	Total 31 March 2024 £'000
Admiral Nurses	1	0	1	0
Afton Ward	0	0	0	0
CCAHMS	3	0	3	0
Community Heart Failure	2	0	2	0
Community Unit	1	0	1	0
Mental Health JC Legacy	0	8	8	0
Sevenacres Staff Fund	0	0	0	0
Wig Fund	2	0	2	0
Stroke Early Disc Team	1	0	1	0
<b>Total</b>	10	8	18	0

Mental Health and Community Services were transferred to Southern Health NHS Trust in May 2024, the fund balances above represent charitable funds relevant to those areas and were transferred to Southern Health NHS Trust.

10 Allocation of Support Costs and Overheads

	Raising Funds £'000	Charitable Activities £'000	Total 31 March 2025 £'000	Total 31 March 2024 £'000	Basic of Allocation
Finance	0	3	3	16	See note below
Information Technology	0	0	0	3	
Audit - Internal	0	0	0	2	
Audit - External	0	5	5	4	
Indemnity Insurance	0	3	3	3	
<b>Total</b>	0	11	11	28	
Unrestricted Funds	0	8	8	15	
Restricted Funds	0	3	3	12	
<b>Total</b>	0	11	11	27	

Support costs are allocated in a two stage process. On a monthly basis, we take 5% of each donation and transfer it to “Administration Expenses”. At the end of the year, this is allocated against the total support costs. If the total exceeds the available contribution then the balance is apportioned across all funds.

For annual accounts reporting purposes, the total value of support costs is then allocated on a pro-rata basis against expenditure activities (see notes 7 & 8).

IOW finance staff and Information Technology are no longer recharged to the Charity. We are now recharged fundraising staff costs from Portsmouth Charity.

11 Trustees Remuneration & Expenses

The Trustees have received no remuneration or expenses in 2024/25.

Notes to the Accounts - continued

12 Analysis of Staff Costs

	Total 31 March 2025 £'000	Total 31 March 2024 £'000
Salaries & wages	3	13
Social security costs	0	2
Other pension costs	0	1
<b>Total</b>	<b>3</b>	<b>16</b>

Average monthly number of employees in the year	2	2
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Employees: Senior Financial Accountant and Financial Accountant - both full time members of staff with IOW NHS Trust. Neither of the employees had emoluments in excess of £60,000.

In 2024/25 IOW NHS Trust started working in partnership with Portsmouth Hospitals University NHS Trust and in order to align processes between the two charities, the IOW finance staff recharge was ceased. Instead, a proportion of the Portsmouth Charity Team salaries was recharged. This was mostly funded by a grant from NHS Charities Together leaving only a balance of £2652.17 to be allocated as part of the support costs.

13 Independent Examiner’s remuneration

The Independent Examiner’s remuneration of £5,000 (2023/24: £6,200) represents external audit only. The cost related solely to the audits with no other additional work being undertaken.

14 Analysis of Fixed Asset Investments

	Total 31 March 2025 £'000	Total 31 March 2024 £'000
Market value at 31 March	285	285
Less: Disposals at carrying value	0	0
Add: Acquisitions at cost	0	0
Net gain on revaluation	0	0
<b>Market value at 31 March</b>	<b>285</b>	<b>285</b>

Historic cost at 31 March	285	285
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Note: These investments are all held with CCLA Investments in a Charities Official Investment Fund (COIF).

15 Analysis of Current Debtors

	Total 31 March 2025 £'000	Total 31 March 2024 £'000
<b>Amounts falling due within one year:</b>		
Accrued income	23	43
Other debtors	0	2
<b>Total debtors falling due within one year</b>	<b>23</b>	<b>45</b>

Notes to the Accounts - continued

16 Analysis of cash and cash equivalents

	Total 31 March 2025 £'000	Total 31 March 2024 £'000
Cash in hand	74	79
<b>Total cash and cash equivalents</b>	<b>74</b>	<b>79</b>

17 Analysis of Current Liabilities

	Total 31 March 2025 £'000	Total 31 March 2024 £'000
<b>Amounts falling due within one year:</b>		
Other creditors	47	39
Accruals	5	8
Deferred income	0	0
<b>Total creditors falling due within one year</b>	<b>52</b>	<b>47</b>

18 Reconciliation of net income/(expenditure) to net cash flow from operation activities

	Total 31 March 2025 £'000	Total 31 March 2024 £'000
<b>Net income/(expenditure) for 2022/23 (as per the Statement of Financial Activities)</b>	<b>(32)</b>	<b>48</b>
<b>Adjustments for:</b>		
Depreciation charges	0	0
(Gains)/losses on investments	0	0
Dividends, interest and rents from investments	(15)	(13)
Loss/(profit) on the sale of fixed assets	0	0
(Increase)/decrease in stocks	0	0
(Increase)/decrease in debtors	22	(1)
Increase/(decrease) in creditors	5	(8)
<b>Net cash provided by (used in) operating activities</b>	<b>(20)</b>	<b>26</b>



19 Details of transfers between funds

Transfer From Fund	Transfer To Fund	Reason	Amount £	Fund Type
NHSCT Development Grant - Fundraising	Working Together		171.35	Restricted
Working Together	ME/MEO & Bereavement		9.50	Unrestricted
Accident & Emergency	Working Together	Static fund	336.84	Unrestricted
Alverstone Ward	Working Together	Static fund	97.90	Unrestricted
Ambulance General	Working Together	Static fund	9.17	Unrestricted
Appley Ward	Working Together	Static fund	11.08	Unrestricted
Breast Screening Ward	Working Together	Static fund	-1.12	Unrestricted
Research Development Fund	Working Together	Static fund	1,657.31	Unrestricted
Colwell Ward	Working Together	Static fund	437.09	Unrestricted
Diabetic Centre	Working Together	Static fund	81.66	Unrestricted
Acute Assessment Unit	Working Together	Static fund	688.51	Unrestricted
Ophthalmic Department	Working Together	Static fund	774	Unrestricted
Compton Ward (old Rehab Unit)	Working Together	Static fund	66.09	Unrestricted
Respiratory Department	Working Together	Static fund	1,741.46	Unrestricted
Rheumatology Fund	Working Together	Static fund	1,429.70	Unrestricted
Urology Unit	Working Together	Static fund	194.59	Unrestricted
Cardiac Investigations	Working Together	Static fund	-0.59	Unrestricted
Accident & Emergency	Training Fund	Agreed contribution	202.11	Unrestricted
Breast Care	Training Fund	Agreed contribution	412.04	Unrestricted
Cancer CNS	Training Fund	Agreed contribution	757.02	Unrestricted
Research Development Fund	Training Fund	Agreed contribution	994.38	Unrestricted
Chapel	Training Fund	Agreed contribution	757.86	Unrestricted
Chemotherapy	Training Fund	Agreed contribution	3,191.84	Unrestricted
Colwell Ward	Training Fund	Agreed contribution	262.25	Unrestricted
Coronary Care Unit	Training Fund	Agreed contribution	10.04	Unrestricted
Intensive Therapy Unit	Training Fund	Agreed contribution	1,179.27	Unrestricted
Luccombe Ward	Training Fund	Agreed contribution	23.70	Unrestricted
Orthopaedic Department	Training Fund	Agreed contribution	84.21	Unrestricted
Respiratory Department	Training Fund	Agreed contribution	1044.84	Unrestricted
Rheumatology Fund	Training Fund	Agreed contribution	857.85	Unrestricted
St Helens Ward	Training Fund	Agreed contribution	35.80	Unrestricted
Stoma Care	Training Fund	Agreed contribution	112.61	Unrestricted
Stroke Services	Training Fund	Agreed contribution	2,478.21	Unrestricted
Women & Childrens Care	Training Fund	Agreed contribution	1,453.90	Unrestricted
End of Life Care	Training Fund	Agreed contribution	2,579.04	Unrestricted
Staff Health & Wellbeing Events	Training Fund	Agreed contribution	57.84	Unrestricted

20 Analysis of Funds

20.1 Restricted Funds

Material funds		Balance 31 March 2024 £'000	Incoming Resources £'000	Resources Expended £'000	Transfers £'000	Gains and Losses £'000	Balance 31 March 2025 £'000
A	Healing Arts	4	0	0	0	0	4
B	Legacy	10	0	0	0	0	10
C	Legacy	57	2	(11)	0	0	48
E	Legacy	21	1	0	0	0	22
G	NHS Charities Together Grant	17	1	0	0	0	18
I	Legacy	8	0	(8)	0	0	0
J	Legacy	2	0	(2)	0	0	0
K	Legacy	10	4	(1)	0	0	13
:L	Legacy	19	1	0	0	0	20
M	Legacy	5	0	0	0	0	5
N	NHS Charities Together Grant	14	0	(14)	0	0	0
		0					0
Total		167	9	(36)	0	0	140

Name of Fund		Description of the nature and purpose of each fund
A	Healing Arts	Link arts with healthcare to improve recovery & promote well-being. Funds are reserved for maintenance & repairs to existing art works
B	Restricted Legacy (Laidlaw)	Legacy bequeathed for Laidlaw Day Hospital
C	Restricted Legacy (ITU)	Legacy bequeathed for Intensive Care
E	Restricted Legacy (CCU)	Legacy bequeathed for Coronary Care Unit
F	Mental Health Grant	Grant received from Richmond Fellowship for Mental Health - now closed
G	NHS Charities Together Grant	Grants received from NHSCT following Covid appeals for patient and staff wellbeing
H	NHS Charities Together Grant	Grant received from NHSCT for Dementia Navigator Project - now closed
	Restricted Legacy (Mental Health)	Legacy bequeathed for Mental Health Services
	Restricted Legacy (Eye Department)	Legacy bequeathed for Eye Department
K	Restricted Legacy	Legacy bequeathed for hospital equipment
L	Restricted Legacy	Legacy bequeathed for Breast Care (PM)
M	Restricted Legacy	Legacy bequeathed for Breast Care (JH)
N	NHS Charities Together Grant	Grant received from NHSCT for Fundraising Development

Notes to the Accounts - continued

20.2 Unrestricted Funds

The purpose of all Unrestricted funds is to benefit patient and staff welfare including education and training where appropriate.

	Balance as at 01/04/2024 £	Incoming Resources £	Resources Expended £	Transfers £	Gains/ Losses £	Balance as at 31/03/2025 £	
Working Together Fund	51,261	17,071	(30,826)	7,675	0	45,182	Note 1
<b>Designated Funds</b>							
Breast Care	1,994	1,546	(932)	(412)	0	2,196	
Cancer CNS	3,785	151	(72)	(757)	0	3,107	
CCAMHS	3,314	0	(3,314)	0	0	0	
Research Development Fund	6,629	176	(239)	(2,652)	0	3,914	
Chapel	4,112	340	(1,028)	(758)	0	2,665	
Chemotherapy	31,918	8,624	(1,206)	(3,192)	0	36,145	
Colwell Ward	1,748	48	(25)	(699)	0	1,073	
Community Heart Failure	2,494	0	(2,494)	0	0	0	
Coronary Care Unit	50	0	(40)	(10)	0	(0)	
End of Life Care	22,964	14,266	(3,616)	(2,579)	0	31,035	
Intensive Therapy Unit	13,044	1,918	(5,684)	(1,179)	0	8,098	
Paediatrics Diabetes	0	4,318	(299)	0	0	4,019	
Respiratory Department	6,886	1,205	(1,054)	(2,786)	0	4,251	
Rheumatology Fund	5,719	158	(80)	(2,288)	0	3,509	
Stroke Services	11,733	954	(7,780)	(2,478)	0	2,429	
Training Fund	10,012	1,259	245	16,495	0	28,010	
Wig Fund	2,370	0	(2,370)	0	0	(0)	
Women & Children's Care	5,676	9,608	(4,816)	(1,454)	0	9,014	
Other funds with movements less than £1000 or balances less than £4000**	9,608	3,257	(4,666)	(2,754)	0	5,445	See next section
Friends of St Marys	(0)	17,015	(17,015)	0	0	(0)	
<b>Subtotal</b>	<b>195,318</b>	<b>81,913</b>	<b>(87,312)</b>	<b>172</b>	<b>0</b>	<b>190,090</b>	
<b>Rounded £'000</b>	<b>195</b>	<b>82</b>	<b>(87)</b>	<b>0</b>	<b>0</b>	<b>190</b>	

Note 1 - Previously named the General Fund

Notes to the Accounts - continued

20.2 Unrestricted Funds (Continued)

**\*\*Breakdown of other funds with movements less than £1,000 or balances less than £4,000\*\***

	Balance as at 01/04/2024 £	Incoming Resources £	Resources Expended £	Transfers £	Gains/ Losses £	Balance as at 31/03/2025 £	
Accident & Emergency	1,347	19	(413)	(539)	0	414	
Admiral Nurses	798	95	(893)	0	0	0	
Afton Ward	178	0	(178)	0	0	(0)	
Alverstone Ward	98	0	0	(98)	0	(0)	
Ambulance General	9	63	(4)	(9)	0	58	
Appley Ward	11	0	0	(11)	0	0	
Breast Screening Unit	31	0	(32)	1	0	0	
Cardiac Investigations	16	0	(17)	1	0	0	
Childrens Community Fund	539	808	(67)	0	0	1,280	
Community Unit	896	500	(1,396)	0	0	0	
Stroke Early Disc Team	653	0	(652)	0	0	0	
Diabetic Centre	82	0	0	(82)	0	(0)	
Endoscopy Unit	578	27	(14)	0	0	591	
Luccombe Ward	118	1	(76)	(24)	0	19	
Acute Assessment Unit	669	0	0	(669)	0	(0)	Note 1
ME/M EO & BEREAVEMENT	479	22	(225)	0	0	275	
Ophthalmic Department	774	0	0	(774)	0	0	
Orthopaedic Department	421	15	(8)	(84)	0	344	
Compton Ward (old Rehab Unit)	66	0	0	(66)	0	(0)	
Sevenacres Staff Fund	8	0	(8)	0	0	(0)	
Staff Health and Wellbeing Events	322	79	(337)	(58)	0	(0)	
St Helens Ward	179	213	(18)	(36)	0	339	
Stoma Care	589	21	(38)	(113)	0	460	
Urology Unit	195	0	0	(195)	0	(0)	
Volunteer Services	0	1,229	(267)	0	0	963	
Whippingham Ward	277	1,229	(17)	0	0	419	
Sabeena Allahdin Research	277	159	(6)	0	0	283	
<b>Total</b>	<b>9,608</b>	<b>3,257</b>	<b>(4,666)</b>	<b>(2,754)</b>	<b>0</b>	<b>5,445</b>	

Note 1 - Previously named Medical Assessment Unit

21 Contacting the Charity

**Fundraising advice can be obtained from the following contacts:**

The Charity Support Team on 01983 822099 ext 6274.  
Website: [www.iow.nhs.uk/get-involved/charitable-funds](http://www.iow.nhs.uk/get-involved/charitable-funds)  
Email: [iownt.charity@nhs.net](mailto:iownt.charity@nhs.net)

Please direct any other query relating to the Charity to:

- Laura Barnes - [laura.barnes14@nhs.net](mailto:laura.barnes14@nhs.net)
- Katie Parrott - [katie.parrott@nhs.net](mailto:katie.parrott@nhs.net)

Charity Information

The Isle of Wight NHS Trust Charity was registered with the Charity Commission as an NHS Charity by Declaration of Trust in September 1995, charity number 1049606.

The Charity has a Corporate Trustee: Isle of Wight NHS Trust (the Trust). Isle of Wight NHS Trust Charity is a registered member of the Fundraising Regulator and adheres to the Codes of Fundraising Practice.

Members of the Trust Board who have acted on behalf of the Corporate Trustee are members of the Charity Board of Trustee with voting rights. In 2024/2025 these members included:

Name	Title	From	Until
Charity Board of Trustees - Executive Directors with Voting Rights In post at 31st March 2024 or having left during the year ended 31st March 2025			
Penny Emerit	Chief Executive	01/06/23	
Mark Orchard	Chief Financial Officer & Deputy CEO	01/09/23	
John Knighton	Chief Medical Officer	01/09/23	
Liz Rix	Chief Nursing Officer	01/09/23	31/03/25
Joe Smyth	Chief Officer - IWT	01/09/23	
Charity Board of Trustees - Non-Executive Directors with Voting Rights In post at 31st March 2025 or having left during the year ended 31st March 2025			
Melloney Poole	Chair	05/10/20	31/12/24
Phil Berrington	Non-Executive Director (Acting Chair 01.01.25-31.03.25)	01/01/22	
Sara Weech	Non-Executive Director	28/01/23	30/06/24
Stephen Brooks	Non-Executive Director	01/01/24	
Deborah McKenzie	Non-Executive Director	01/10/24	
Graham Barnetson	Non-Executive Director	01/04/24	
Christine Slaymaker	Non-Executive Director	01/04/24	

The Trust Board delegated the authority for the management of the Charity to the Trust's Charity Board of Trustees. No member of the Trust Board received remuneration from the Charity during the year. The Trust Board is remunerated by the Trust for their role as Executive and Non-Executive Directors of the Trust.

The Trust Board has approved the establishment of a body to be known as the Charity Board of Trustees, on which voting members of the Board of Directors will sit, for the purpose of:

- Overseeing the management of the affairs of the Charity on behalf of the Trust, the sole Corporate Trustee of the Charity;
- Ensuring that the Charity operates within the terms of its Trust Deed and appropriate registration with the Charity Commission.

- In particular the Charity Board of Trustees:
- manages the affairs of the Charity within the terms of its Trust Deed and appropriate legislation;
  - oversees the investment of funds in accordance with the Trustee Act 2000 and, if necessary, appoints fund managers to act on its behalf;
  - ensures funding decisions are appropriate and consistent with the Charity's objectives, to ensure such funding provides added value and public benefit;
  - receives regular reports on the performance of any charitable fundraising activities;
  - oversees the implementation, as appropriate, of procedures and policies to ensure accounting systems are robust, donations are received and coded as instructed and that all expenditure is reasonable, and ethically appropriate;
  - approves the annual accounts and report of the charity, ensuring that all relevant information is disclosed
  - reviews and approves any returns/ information required to be submitted by legislation to NHS England & Improvement and the Department of Health & Social Care or the Charity Commission;
  - makes arrangements to induct new members of the Committee

Membership

- The Board of Trustees will include the following members:
- Chair of the Trust (Chair);
  - All voting Non-Executive Directors on the Board of Directors;
  - All voting Executive Directors on the Board of Directors.

All members listed above have voting rights on the Charity Board of Trustees.

The Chair of the Charity Board of Trustees is also the Chair of the Board of Directors of the Trust.

In addition to the Charity Board of Trustees, there is also a Charity Assurance Committee which meets monthly, for the purpose of:

- Monitoring progress of Charity against strategic and/or operational plans.
- Oversee and recommend charitable funds expenditure between £5,000-£15,000 in accordance with charitable funds policies. Recommendations are made to the CFO to progress under their scheme of delegation.
- Review bids of £15,000+ ahead of submission to the Charity board
- On a monthly basis receive and review a list of all charitable funds expenditure, to include grants of <£5,000 Review the Charity Risk Register
- Receive and review annual charitable funds' expenditure plans
- Ensure that Charity policies and procedures are updated and maintained in accordance with applicable Charity Law
- Ensure that the Charity Annual Report and Accounts are appropriately drafted for Charity Board Approval
- Ensure that any procedural documents relating to the Charity are appropriately written, ratified and monitored for compliance in accordance with Trust Policy
- Ensure that systems and processes for the regular evaluation and monitoring of compliance against any relevant internal and external assessment, standards or criteria are established, developed and maintained.

- The Charity Assurance Committee includes the following members:
- Chief Financial Officer
  - Chief Nursing Officer
  - Chief Officer
  - Director of Governance and Risk
  - Head of Communications and Engagement
  - Chief People Officer
  - Head of Financial Accounting (or nominated deputy)
  - Head of Charity (or nominated deputy)
  - Fundraising and Supporter Care Manager
  - Group Secretarial Support

From January 2024, in line with the partnership between the Isle of Wight NHS Trust Charity and Portsmouth Hospitals University NHS Trust, the two respective charities (Isle of Wight NHS Trust Charity and Portsmouth Hospitals Charity) work in greater partnership. This will include Charity Assurance Committee and Board Meetings in Common. They will remain separate statutory bodies.

# Charity Information

Each of the funds has at least two signatories who act as fund holders on a day to day basis. It is expected that the fund holders manage these funds in accordance with the Standing Financial Instructions, Standing Orders, Charitable Funds Code of Procedures and Scheme of Delegation as set by the Corporate Trustee.

There have been no material changes to these policies and procedures this year.

The objectives of the Charity and its Special Purpose/ Speciality Charities are as follows:  
Funds are held for any charitable purpose relating to the National Health Service.

Speciality charities  
Funds are held for any charitable purpose relating to the specialty services provided by Isle of Wight NHS Trust.

Members of the Trust Board and the Charity Board of Trustees are not individual trustees under charity law but act as agents on behalf of the Corporate Trustee. Non-Executive Members of the Trust Board are appointed by NHS England & Improvement and Executive members of the Board and are subject to recruitment by the NHS Board. The NHS Trust, as Corporate Trustee, appoints a Charity Board of Trustees to manage the Charity under delegated authority.

Acting for the Corporate Trustee, the Charity Board of Trustees is responsible for the overall management of the Charitable Fund and meet quarterly.

The Charity Board of Trustees is required to:

- Keep proper accounting records which disclose with reasonable accuracy the financial position of the fund held on trust and to enable them to ensure that the accounts comply with requirements in the Charities
- Act and the Statement of Recommended Practice by charities (SORP) 2015, updated 2016.
- Establish and monitor a system of internal control. Establish arrangements for the prevention and detection of fraud and corruption.
- Advise the Trust Board on the performance and risks of the Charity.
- Review and approve the Annual Report and Financial Statements.
- Review the Governance Report and confirm any non-adjusted accounting errors.

The accounting records and day-to-day administration of the fund are dealt with by the Senior Financial Accountant at the principal address

## Activities

Isle of Wight NHS Trust Charity ensures that all activities carried out to raise funds are in line with the Fundraising Regulator and Codes of Practice and the Charity's internal processes and policies. The Team are aware of donors wishes ensuring that these are honoured and communicated with the donor. In the year 2024/25 we received no complaints. The Fundraising Team have mandatory training each year on safeguarding for vulnerable adults and this is then integrated into supporting vulnerable donors to ensure they are protected.

## Public benefit

The Trustees confirm they have paid due regard to Charity Commission guidance on public benefit in deciding what activities the Charity have undertaken during the year and have continued to support a wide range of charitable activities. These include charitable grant funding for the Trust and fundraising across a number of platforms to raise more funds.

In awarding grants the Trustee is aware of its responsibilities under charity law in ensuring the maintenance of public benefit in all aspects of its work. Funding patient and staff welfare, improvements and amenities is, by definition, meeting public benefit.

Isle of Wight NHS Trust is the main beneficiary of the Charity and is a related party by virtue of being the Corporate Trustee of the Charity. However, when the Trust Board is making decisions regarding the Charity it does so with the best interests of the Charity in mind and with consideration of Charity Commission guidance, Charity law and the expressed wishes of donors.

By working in partnership with the Trust, charitable funds are used to best effect for the benefit of patients and staff. When deciding upon the most beneficial way to use funds, the Corporate Trustee has regard to the main activities, objectives, strategies and plans of the Trust.

The Charity achieves its purpose by making charitable grants to the Trust to fund expenditure on equipment and by direct expenditure on staff, education, environmental improvements and other complimentary services.

# Reference and Administrative Details

**Registered and Working Name**  
Isle of Wight NHS Trust Charity

**Registered Charity Number**  
1049606

**Registered Address**  
Isle of Wight NHS Trust Charity,  
St Mary's Hospital,  
Newport,  
Isle of Wight,  
PO30 5TG

**Principal Address**  
Isle of Wight NHS Trust Charity,  
St Mary's Hospital,  
Newport,  
Isle of Wight,  
PO30 5TG

**Charity Contact Details**  
Tel: 02392 283392  
E-Mail: [iownt.charity@nhs.net](mailto:iownt.charity@nhs.net)  
[www.iow.nhs.uk/get-involved/charitable-funds](http://www.iow.nhs.uk/get-involved/charitable-funds)

**Independent Examiner**  
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**Bankers**  
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