



# OLIVE TREE CANCER SUPPORT GROUP

Annual report and accounts for the year ended  
31 August 2023

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/](http://www.olivetrecancersupport.org.uk/)



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# Chair's statement

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Trevor Christmas  
Acting Chair

I am pleased to report that significant progress has been made by our charity in the course of the 2022/23 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.

We have continued to experience substantial increases in the number of new patients and users at both of our Centres. The Crawley Centre has seen visitor numbers return to pre-pandemic levels, and the Horsham Centre, which has now been operational since October 2022, has continued to see growth in service users.

The 2022/23 year has been challenging for fundraising. We raised a total income of £104,435, a significant reduction from the previous year's £184,226. This was also considerably below the level of expenses incurred at £186,056, resulting in a deficit for the year of (£81,621).

To support the increased number of service users, the Olive Tree will now require a significantly higher level of income, beyond even that achieved in 2021/22. To address this, we have successfully obtained two new multiyear grants from the National Lottery Community Fund - RC London and South East Region and the Sussex Integration Care Board, which will cover around a quarter of the annual expenses, but that still leaves a major fundraising challenge for the coming year. The trustees have consequently restructured the fundraising capabilities of the organisation, which are expected to drive higher levels of income in the coming years. The financial reserves of the Charity remain healthy, but this level needs to be at least maintained given the volatile nature of the organisation's income streams and the long-term nature of the services provided.

This year also saw retirement of Marilyn Drury, the Manager of the Olive Tree for more than 15 years. Marilyn supported the services users, volunteer therapists and counsellors, and staff, as well as managing the organisation day to day through a period of growth and development, from humble beginnings to the significant provider of essential, highly valued support services delivered from two centres that we see today.

Graham Nicoll, the chair since 2018, has stood down from the role in October 2023, although he remains a trustee. Graham oversaw the Charity through the period of its fastest growth and development, being actively involved in many initiatives. He also supports the Cancer community more widely, providing his considerable experience and knowledge, as well as his involvement in a number of leading-edge clinical trials.

All changes to staffing and the trustee board are detailed in section 3. How we operate.

## 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 and the diversification of income streams to reduce volatility. In addition to our regular patient satisfaction survey, in 2023 we launched a questionnaire to Centre visitors to enhance our understanding of their needs and experiences.

A handwritten signature in black ink, appearing to read 'T. Christmas', written over a white background.

Trevor Christmas  
Acting Chair

# 1. Who we are and what we do

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## 1.1 Background and a summary of charity activities in 2022/2023

### 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 centres in Crawley and, from October 2022, its support centre in Horsham. 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 continues to be a marked increase in demand for our services. In 2022/23, our Centres welcomed 322 new users, compared with 245 in 2021/22 with 104 in our Horsham facility, up from 48 as this site becomes established.

*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.*

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.

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.

### 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 3,066 user visits to our Centres in 2022/2023 (up by 37% on the previous year, at 2,241 visits, a reflection of the success of the Horsham facility, the continuation of 'a return to relative normality' following the pandemic and of the increasing demand for our services) with an average of 256 per month (2021/22 187). Complementary therapy continues to be the most popular reason for a visit (at 56%) followed by counselling (14%).

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
<b>Information support</b>	Library of books, magazines, local and national information, and Macmillan brochures.
<b>Complementary therapies</b>	<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"> <li>• Acupuncture</li> <li>• Aromatherapy</li> <li>• Energy Healing</li> <li>• Meditation and relaxation</li> <li>• Reflexology</li> <li>• NADA protocol ear acupuncture</li> <li>• Bowen Technique</li> <li>• Emotional Freedom Technique (EFT)</li> <li>• Pranic Healing</li> <li>• Massage</li> <li>• Reiki</li> <li>• Emotional Support Therapies</li> <li>• Cranio-Sacral Therapy</li> <li>• Hypnotherapy</li> <li>• Indian Head Massage</li> <li>• Oncology Massage</li> </ul>
<b>Counselling &amp; Coaching</b>	Counselling and Coaching offers patients alternative approaches to find their own solutions to difficulties, and a way through a crisis and beyond.
<b>Support groups</b>	Breast cancer group, Secondaries club, Prostate cancer group
<b>Workshops</b>	Various topics - Mindfulness, Card Making, Headwrappers
<b>Pink Ribbon programme</b>	Exercise for breast cancer patients
<b>Exercises classes</b>	Yoga, Pilates, Qigong
<b>CAB Welfare/ Benefits</b>	Confidential benefits advice
<b>Drop in</b>	Social afternoons to discuss any concerns or just speak with someone
<b>Wig service</b>	Selection of wigs, hats, scarves and bandanas with a fitting service

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

<p><i>Lisa Legg - Service User</i></p> <p>“ Living with cancer can be a very lonely place, but The Olive Tree is a place where I can feel free to express myself and know that I will be understood, whether with other people going through a similar experience to myself, or with any of the wonderful staff and volunteers who always have time for a chat and a cuppa.</p>	
	<p><i>Caron Gillet - Service User</i></p> <p>“ I was pointed towards the Olive Tree by a friend who had accessed the support they offer. “They are really lovely people” were her exact words, and this proved to be true. Their continued support and care have been an anchor through the year and now I am looking forward to beginning to give something back.</p>
<p><i>Jess Hurley - Volunteer Therapist</i></p> <p>“ To be able to provide an hour of complete relaxation, escapism, and a calming touch to someone who is going through treatment is an absolute pleasure. I leave every session feeling wonderful knowing that I can make a real difference in someone’s day, or week even, and give them an appointment that they can look forward to.”</p>	

## Horsham Centre

The Horsham Centre became operational in October 2022, bringing all the services in the area together, closing the facilities at Total Therapy and Horsham hospital. Much credit goes to the then Centre Manager Terrie Stephens (now Crawley Centre Manager) who worked tirelessly to make this happen, enabling us to support even more people affected by cancer who would otherwise have to travel outside of the area to access similar services.

We formally launched the new centre with an official celebration on 22<sup>nd</sup> February 2023, with numerous guests and Olive Tree President Nicholas Owen.



*Jeanette Watson - Service User*



*Always a joy to visit. The staff are all very friendly, and nothing is too much trouble. I don't know what I would have done without their support."*



*Dave Stoner - Member*



*I highly recommend Olive Tree! I do have a strong faith and I do not believe that this life is all there is. However, I needed the support of fellow cancer patients. This, I found at Olive Tree. Don't go it alone. We all need support!*

## 1.2 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.

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 a Macmillan analysis as of September 2021, an estimated 3 million people were 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, we are now 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

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### 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 eight Trustees (ethnicity ratio - Asian 38%, White 62%). 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, volunteer and relationship management 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.



Trevor Christmas



Louise Cheung



Yulia Baynham



Graham Nicoll<sup>1</sup>



Raj  
Limbachia



Ian Lineham<sup>3</sup>



Ricky Ng<sup>3</sup>  
(Sai Yeung Ng)



Siobhan Hogan<sup>3</sup>



Stephen Baily<sup>2</sup>

In accordance with section 13 of the CIO Constitution

- 1 Graham Nicoll retired by rotation at the Annual General Meeting held on 1<sup>st</sup> December 2023 (the “AGM”) and was re-elected for a further 3-year term.
- 2 Stephen Baily retired at the AGM and did not seek re-election.
- 3 Ian Lineham, Ricky Ng and Siobhan Hogan were appointed as Trustees since the AGM. They will retire at the next Annual General Meeting and seek reappointment by the members for a 3-year term.
- 4 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, Trevor Christmas is acting as Chair pending a formal nomination and appointment process.

The trustees would like to thank Stephen Baily for his support and dedication to the Olive Tree since joining the trustee board in 2020.

## Governance

Trustee meetings take place monthly, every first Wednesday, in person or remotely. The Olive Tree Centre Managers and the Head of Fundraising and Communications 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 2022-2023.

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

The Charity currently has a staff of six, all of whom are directly employed by the Olive Tree Cancer Support Group.



**Terrie Stephens**  
Crawley Centre  
Manager



**Sheri Werner**  
Horsham Centre  
Manager



**Sophia Rapley**  
Head of  
Fundraising and  
Communications

Terrie Stephens was appointed as Crawley Centre Manager, following the retirement of Marilyn Drury in May 2023, having previously managed the Horsham Centre.

Sheri Werner joined in May 2023, replacing Terrie as Centre Manager in Horsham. Sheri previously volunteered with the Olive Tree as a Reiki therapist and now brings her significant professional experience to the Olive Tree, having worked for a major law firm in London.



**Jackie Nunn**  
Administrator



**Kerry Cameron**  
Administrator



**Charlotte Hawkins**  
Communications  
Administrator

Sophia Rapley joined the Olive Tree in April 2024, in the newly created post of Head of Fundraising and Communications, following the trustees' initiative to strengthen the Charity's fundraising capabilities. Sophia brings a wealth of experience within the charity sector, and we very much look forward to working with her in the coming years.

We also welcomed Kerry Cameron on board as an administrator at the Olive Tree in July 2023, working alongside Jackie. Kerry has volunteered as a therapist and supported other activities at the Olive Tree for a number of years.



**Marilyn Drury<sup>5</sup>**  
Centre Manager



**Helena Taylor<sup>5</sup>**  
Fundraising  
Manager



**Mehrafagh (Afagh)  
Kalani<sup>5</sup>**  
Administrator



It is with great sadness that we must report the passing of Lisa Balcomb in May 2023. Lisa had worked tirelessly as an administrator at the Crawley Centre for almost 10 years, supporting many individuals suffering the effects of cancer, while fighting the very same disease herself. Lisa was extremely popular with the staff, volunteers and service users, and is very greatly missed.

The trustees would like to thank Sheri, Terrie, Charlotte, Kerry and Jackie for their hard work and commitment in running the day-to-day operations of the Centres, while at the same time giving empathy, compassion and support to everyone who visits the Olive Tree.

<sup>5</sup> The trustees would like to thank Marilyn for the amazing work she did, developing and managing the Olive Tree over the 17 years up to her well-earned retirement. They would also like to thank Helena Taylor for her work as Fundraising Manager and Mehrafagh (aka Afagh) Kalani as administrator for their work for the Charity, both of whom left the Olive Tree to pursue other opportunities.

## 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 include 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 six 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 2022/2023

The provision of our services is primarily 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.

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 donor does not wish the money to be used for a suitable alternative purpose.



**Helena Taylor**  
Fundraising Manager  
(until December 2023)



**Sophia Rapley**  
Head of Fundraising  
and Communications  
(Joined April 2024)

### Fundraising Performance

Following the continued growth of the Charity's operations and therefore its fund requirements, the Trustees launched an initiative to strengthen the capabilities, with the creation of a new post, Head of Fundraising & Communications. Sophia Rapley was appointed to this post in April 2024, and we very much look forward to working with her in the coming years. We are grateful for the work of Helena



Taylor during her time at the Olive Tree and wish her good luck in her future endeavours. We would like to thank The Henry Smith Charity for their continued support in supporting 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 2022/23 from all sources (excluding investment income) was £99,239 (2021/22: £184,226).

We gratefully received grants from The National Lottery Community Fund, Pink Ribbon Foundation, Gatwick Airport Community Trust, Longley Trust, Albert Hunt, The Hendy Foundation, Horsham District Council and the Hospital Saturday Fund. We would also like to thank Crawley Borough Council, Sussex Police, Magic Little Grants, Rowan Bentall Charitable Trust and Marsh Charitable Trust for their financial support, and express our gratitude for the kind and generous donations in memory received in the year; in these toughest of times - every contribution we receive makes a significant difference. We would also like to thank James for Carpets which donated new carpet for our Horsham Centre, Cocoa Loco, Floating Feather, and Arch Insurance International for their support.

### 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 TCR Gatwick, Over the Hillbillys at Ifield Golf Club, Bohunt School and RAM Cricket Club, who have each helped raise large sums that have proved integral to our ability to support our patients. Also, individual fundraisers Theresa Murray, Jon Hawkins, who completed the South Downs Century 2023 cycling challenge, and Jamie Hawkins, who nominated the Olive Tree to benefit from Bohunt School's Big Camp Out.



Over the Hillbilly's cheque presentation



Steel band at the RAM Club's Caribbean Night



Jon Hawkins completing his 100 mile ride



Poster designs from Bohunt School's Big Camp Out

We enjoyed several fundraising activities in our vibrant communities in Crawley and Horsham in 2022/23. These included match-day collections at Crawley Town FC and Horsham FC; a foyer collection at the Hawth Theatre, quiz night at the Red Deer, Horsham and a presence at the RAM Cricket Club tournament in July 2023 and at Crawley Pride in August 2023. Our thanks to all the dedicated volunteers who took part and thank you to all our community partners for their continued generous support.

We were chosen as Charity of the Year for the civic year 2023/24 by Chairman of Horsham District Council Cllr Dr David Skipp and thank him for his kind support of the Olive Tree.

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

Our donors are critical to the ongoing success of the Olive Tree. As well as being a source of funding, they are also often the most enthusiastic supporters and promoters of our goals and mission. Funders require tailored information and ongoing communication by way of monitoring and end of funding reports, and we are committed to collecting and providing the most useful data so that they can continue to trust in our delivery of services. For individual and corporate donors, we are creating a fundraising pack that ensures each donor is supported and recognised at each stage of their fundraising journey in a consistent way.

### Looking Forward

With new members registering to use our services month on month, and with a focus on developing our services to ensure that they are as wide-reaching and inclusive as possible, whilst engaging and training our volunteers, our fundraising challenge will become greater. To date, this has proved to be very challenging. There is greater competition for grants and community funds available to us. We are exploring ways to diversify our income streams so that we tap into the community spirit present in the areas in which we work, strengthening our connections with local businesses, creating more fundraising activities in our Centres and engaging more effectively and consistently with individual fundraisers.

## 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 X (Twitter) and to proactively engage further with these channels through our recently appointed Head of Fundraising and Communication, Sophia Rapley. 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 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 tailormade 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 2022/2023

#### Treasurer's report

The charity has experienced a more challenging fundraising environment in the 2022/23 year. This, together with the expansion of operations in Horsham, opening the centre in Lavinia House significantly increasing the cost base of the Charity, presents a new level of financial challenge for the organisation.

This is largely a consequence of the nature of the Charity's funding, comprising primarily donations, grants, legacies and other non-recurring income, resulting in a less predictable income stream than

many other similar organisations. Thankfully, the strong financial position at the end of the previous year means the charity remains well placed to continue delivering its services for the foreseeable future.

The deficit for the year was £(81,621), following a surplus of £76,841 in the prior year. That deficit is a result of a combination of reduced income and the additional expenses incurred in the Horsham centre, details of which can be found in the Income and Expenditure Account at section 4.3. 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 £104,435 (inclusive of interest), significantly down from £184,226 in the prior year. The decrease includes a bequest from the Estate of June Scott Aird of £75,716 received in the prior year, with no equivalent amounts being received in the current year. The planned expansion of fundraising and grant activity in the current year unfortunately did not materialise, but new plans are now in place, including some longer-term funding arrangements.

### Expenditure

Expenditure for the year was £186,056, up from £107,385 in the prior year. The increase of £78,671 was primarily from Equipping and fitting out the Horsham centre, staff costs with additional resources in fundraising, awareness and administration, and drop-in and therapy expenses following increased activity.

### Financial Impact

Activity levels in the Crawley centre have now increased to pre-pandemic levels, and activity in the new Horsham centre is building rapidly. We currently have a significant waiting list for our services and a shortage of volunteer therapists. We continue with the drive to recruit additional volunteer therapists and counsellors to enable us to address that list which will, of course, further increase the drop-in and therapy expenses.

### Financial Outlook

There are a number of areas which will give rise to increased expenses in the coming year. A full year of expenses at Lavinia House, increased fundraising resources and the employment of a second centre manager in 2023, previously a secondee from the NHS. The latter post is currently largely funded by a grant from the Sussex Integration Care Board, and the Olive Tree now benefits from a grant from the National Lottery Community Fund - RC London and South East Region, which will together cover around a quarter of the Charity's expenses. This still leaves three quarters of the annual expense budget to be raised in the year.

While the level of reserves held at the start of 23/24 are considerably down on the previous year, they still provide a financial buffer, giving the trustees a high level of confidence that sufficient funds can be raised to continue delivering services for the foreseeable future.

## 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	15,406
Income Received	11,285
Expenses Paid	(25,213)
Funds c/fwd	£ 1,478

**Horsham Information Hub.** A grant from Macmillan funding costs in the Horsham centre ended in the previous financial year. The balance of £2,541 carried forward has now been fully expended.

**Horsham Services.** A balance of £8,959 from a grant received from S C Foundation in the previous financial year was carried over into the current financial year and has now been fully expended.

**Counselling Grant.** A grant from the S C Foundation in respect of counselling supervision costs carried over at the start of the year at £2,100 has now been fully expended.

**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 £213,389, decreasing from £281,082 for the prior year, are in line with the reserving policy (below) and follow the deficit 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:

- a. act in the interests of their charity and its beneficiaries
- b. protect and safeguard the assets of their charity
- c. act with reasonable care and skill
- d. 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 £196,000 to £295,000 (2022: £193,000 to £290,000), slightly up on the previous year. There is an increase due to



the property commitments largely offset by a reduction in the risks associated with preferential costs currently enjoyed by the Charity.

Actual unrestricted reserves at £213,389 (2022: £281,082) are within the target range.

### Large Donations, Grants and Bequests

Significant amounts (£2,000+) were received from:

Celebration of World Women - Waller	£6,084
CPR Computers	£2,000
Hendy Foundation	£3,600
Over the Hillbillies Golf (in memory of Mick Jenkins)	£2,400
Penny Hayles (in memory of)	£2,950
Pink Ribbon Foundation	£4,500
RAM Club	£5,000
The Albert Hunt Trust	£5,000
The Henry Smith Charity	£6,600
The Hospital Saturday Fund	£2,000
The National Lottery Community Fund - RC London and South East Region*	£5,000

\* Please note that this was the first instalment of a 5-year grant totalling £100,000 for the period.

Fundraising donations via JustGiving were £17,510.

### Independent Examiner

Sue Edwards has been appointed as independent examiner to Olive Tree Cancer Support Group during the year following the resignation of Ian Lineham from that role..

Approved by the trustees on 28 May 2024 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 2023 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 Charity'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.

*S. M. Edwards*

Sue Edwards  
Chartered Certified Accountant  
74 Anderida Road  
Lower Willingdon  
Eastbourne  
East Sussex  
BN22 0PZ

Date 27 June 2024

## 4.3 Income and Expenditure Account

Year ended 31 August 2023

	2023	2022
	£	£
<b>Income</b>		
Fundraising and Donations	54,633	38,467
Grants	30,950	49,149
Covid-19 related grants <i>including CJRS</i>	-	478
Bequests	-	81,966
Drop-in and Therapy Donations	9,959	9,722
Events	3,697	2,981
<b>Total Operating Income</b>	<b>99,239</b>	<b>182,763</b>
Interest	5,196	1,463
<b>Total Income</b>	<b>104,435</b>	<b>184,226</b>
<b>Expenditure</b>		
Staff Costs	110,049	66,242
Drop-in and Therapy expenses	17,950	11,644
General Expenses	16,244	18,824
Equipment	14,177	413
Premises (Horsham)	24,551	7,796
Fund Raising	2,584	620
Advertising and Awareness	-	1,347
Training	501	499
<b>Total Expenditure</b>	<b>186,056</b>	<b>107,385</b>
<b>Excess of Income over Expenditure</b>	<b>(81,621)</b>	<b>76,841</b>
<b>Opening Funds</b>	<b>296,488</b>	<b>219,647</b>
<b>Closing Funds</b>	<b>214,867</b>	<b>296,488</b>
<b>Reserves</b>		
<b>At 31 August</b>		
Cash at Bank	214,867	296,488
Restricted Funds	(1,478)	(15,406)
<b>Unrestricted Reserves</b>	<b>213,389</b>	<b>281,082</b>

## Notes to the Financial Statements

The Charity had funds at 31 August 2023 of £214,867 (2022: £296,488) which were invested as follows:

	2023	2022
	£	£
CAF Cash Account (current account)	12,701	16,684
CAF Gold Account (immediately available)	24,000	30,000
CAF Gold (Direct Donations, immediately available)	1,100	55
Cambridge and Counties (95 days' notice)	80,283	80,134
Redwood Bank (95 days' notice)	56,783	84,615
Saffron Building Society (immediately available)	40,000	85,000
	<b>£214,867</b>	<b>£296,488</b>

## THE OLIVE TREE CANCER SUPPORT GROUP CONTACT DETAILS

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