

THE OSBORNE TRUST

England & Wales · Charity number 1160073

Details

Other names T-O-T

Status Registered

Legal form Trust

Registered 2015-01-21

Register [View on the Charity Commission register](#)

Contact

Address The Osborne Trust
PO Box 349
Rhyl
LL18 9HX

Phone 07712089273

Email the-osborne-trust@outlook.com

Website www.theosbornetrust.com

Activities

Objects: THE RELIEF OF CHILDREN AND YOUNG PEOPLE AGED 16 YEARS AND UNDER WHOSE PARENT/SHAVE CANCER BY THE PROVISION OF RECREATION/LEISURE TIME ACTIVITIES DURING THEIR PARENT/S CANCER TREATMENT.

Activities: We provide children aged 16 years and younger whose parents are undergoing cancer treatment with the following- up to 3 local activities.- Ozzy our stuffed elephant- journal for emotional well being and resilience.

Classification

- **How:** Provides Services, Provides Advocacy/advice/information
- **What:** General Charitable Purposes, The Advancement Of Health Or Saving Of Lives, Recreation
- **Who:** Children/young People

Geography

- Northern Ireland
- Scotland
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2025-06-30	£157,481	£107,326	-	-
2024-06-30	£95,940	£107,328	-	-
2023-06-30	£103,291	£87,225	-	-
2022-06-30	£72,282	£84,915	-	-
2021-06-30	£82,957	£77,764	-	-

Trustees

Name	Role	Appointed
CLARE GRIFFITHS	Chair	2015-01-04
ANGELA EVANS		2021-11-06
Anwen Maher		2018-11-24
HELEN DANIELS		2021-05-14
ISABELLA DURES-VARLE		2024-11-01
JENNIFER BRIGHT		2024-11-01
NICKI GRAYSTON		2016-11-08
Sioned Davies		2018-11-24

THE OSBORNE TRUST

England & Wales - Charity number 1160073

Accounts

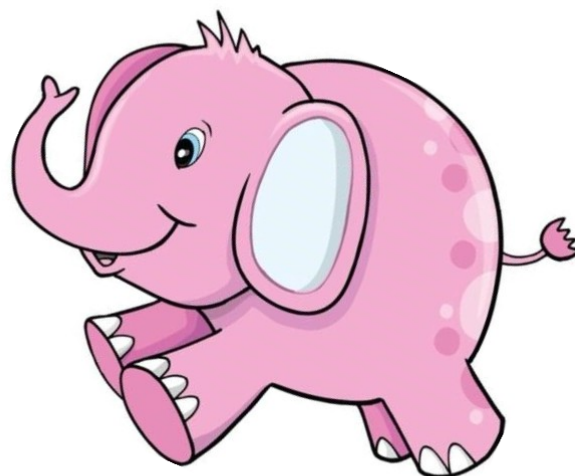
ANNUAL REPORT 2024-2025

CHARITY NUMBER IN ENGLAND & WALES 1160073



**SUPPORTING CHILDREN DURING A PARENT'S CANCER & BEYOND
ACROSS THE UK**

JULY 2024-JUNE 2025



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1- Executive Summary

The Osborne Trust (the 'Charity') is a registered charity in England and Wales (1160073).

Founded in July 2014 from Rhuddlan in North Wales and operates throughout the UK & Northern Ireland, with majority of its work taking place in England and Wales. The Osborne Trust now has its headquarters in Rhyl in North Wales.

1.1 Rationale

The charity was set up in response to a lack of support for children during a parent's cancer. The founder has personal experience of being diagnosed with cancer with 2 young children. Her encounter of finding no support for her own children generated her desire to provide other children whose Mum/Dad have cancer with the support she found lacking for her 2.

The Osborne Trust mission statement has now changed since our inception and now encompasses support for children who have seen a parent die from cancer.

Supporting children during a parent's cancer & beyond

And priority goes to supporting families where: -

- a) Children (by children we mean those who are 18 years and younger) living with a parent who has a cancer diagnosis, is having cancer treatment, seen a cancer recurrence, living with incurable cancer and if applicable seen a parent die from this disease.

The Osborne Trust vision is:

Every child who sees a parent go through cancer can access emotional and practical support from the Trust.

1.2 Structure

The Osborne Trust currently has one full time staff member and a strong board of trustees/management committee drawn from various sectors with a wide

range of skills and expertise, in addition to a personal experience of cancer. The current staff team consists of a CEO/Charity Manager.

All trustees provide their time in a voluntary capacity.

1.3 July 2024-June 2025

The Osborne Trust is now in its 10th year and is still the only charity focusing solely on supporting children during a parent's cancer across the whole of the UK & NI. Our core support programme of funding local respite activities and packages we provide are funded entirely by donations, fundraising and some grant funding. All our support services are provided free of charge to families.

The funds raised by The Osborne Trust is generated by charity led fundraising activities and sales of branded merchandise. Alongside this, fundraising and donations from individuals, community groups and businesses as well as sourcing grants and funding wherever possible. This year we have successfully acquired funding from National Lottery Community Fund in both England and Wales; this will cover a large portion of our CEO's salary as well as fund our new school holiday programme. Additionally, we secured local funding from Tesco Abergele for our school holiday programme across North Wales families.

Funds have been used effectively to support our core areas of support. These are reducing isolation for children through a local respite activity, providing comfort through our Ozzy the Elephant teddy and equipping children and young people with mindfulness tools such as journals, books, flashcards and colouring to assist their emotional well-being.

Our profile about what we do and who we support across the UK & NI are still reaching high numbers. In 2024-2025 we supported 773 children from 384 families. The numbers are slightly down on last year, 51 children and 29 families. This is the first year where number have decreased from year-on-year figures. Yet some areas of the UK & NI have seen a big increases in the number of referrals submitted.

We have seen an increase in referrals from new areas/counties such as Devon, Derbyshire, Northumberland, London & South Wales.

We find once a Macmillan Information Officer, Breast Care Nurse, Cancer Support worker and other staff at cancer centers and hospitals find out about us, referrals increase dramatically for a county/area. We have strengthened our close working relationships with others in the areas where we see a high

rate of referrals coming in, such as the radiotherapy department at North Wales Cancer Centre. Our founder and manager has strengthened relationships with the chemotherapy suite at the local cancer centre in North Wales due to her treatment over this year.

There are some areas that need revisiting in our next year. We will be focusing on getting out information back out to Scotland as referrals there has decreased dramatically for the past couple of years compared to previous years.

The families we have supported are also important ambassadors for us to help promote to the work we do.

1.4 2021-2026

As The Osborne Trust moves into its 11th year and beyond, much of our work will be around increasing the number of children and young people we support and tailoring this support to their needs from their feedback. Our work continues to be led by the children and young people we support. Our strategic aims over the next 5 years are as follows:

- To continue to support children and young people through our core support programmes.
- To offer high school aged children access to peer to peer support through activity-based group exercise and activities.
- To ensure cancer patients who are parents to under 18-year-olds receive consistent and accurate advice regarding support on offer for their children.
- To ensure families are signposted to FREE support programmes and packages to assist their children during their cancer and not signposted to those where they must pay for any support for their children.
- To increase the number of staff to meet the increasing demand and geographical spread of our work.
- To create and manage a volunteer structure and corresponding policy.
- To develop a support programme for those children who experience a parent living with incurable/terminal cancer and/or die from cancer.

Specific goals for the next 5 years are set out in section 5

2- Organisational Details

2.1 Charity Name

The Osborne Trust

2.2 Registered Address

Po Box 349, Rhyl, Denbighshire, LL18 9HX, Wales

2.3 Correspondence Address

Po Box 349, Rhyl, Denbighshire, LL18 9HX, Wales

2.4 Telephone Number

07712 089273

2.5 Email

the-osborne-trust@outlook.com

2.6 Website

www.theosbornetrust.com

2.7 Legal Status

Registered Charity in England and Wales No: 1160073

HMRC Charities Ref: EW29751

Member of the Fundraising Regulator

2.8 Objects

The Trusts objects, as listed on the Charity Commission are specifically related to the following:

The relief of sickness and need, and the preservation of health for children affected by their parent's cancer:

- a) To provide children and young people aged 16 years and under whose parents have cancer some time out activities during their parent's cancer treatment by funding these activities.
- b) For the provision of activities that will bring comfort to children under 16 years of age whilst their parents have cancer, which will in turn have a beneficial effect on the well-being of the family during this time.
- c) To fund the provision of leisure services/activities for children and young people where the parent has cancer, such as plays centre activities, cinema tickets bowling passes etc. to relieve the stress placed upon families during cancer treatment by paying for these to take place.

3- The Osborne Trust

3.1 Vision

To support every child & young person living with a parent undergoing cancer treatment & beyond.

3.2 Mission Statement

Supporting children during a parent's cancer treatment & beyond.

To achieve this as a charity we aim to reduce children and young people's isolation, provide mindfulness tools to feel better able to cope and provide emotional support through our core support programmes and packages.

3.3 Values

The work of The Osborne Trust reflects the key principles and values of the Charity, upheld by its Board of Trustee- confidentiality, transparency, equal opportunities for all and the unique circumstances of each person/family supported.

3.4 What we do

Charitable activities are provided through 5 main priorities:

1. Offering each child referred into our service a support pack made up of items they identify they need such as our Ozzy teddy for comfort, journaling for mindfulness, flashcards for younger children and colouring.

2. Funding local respite activities to reduce children's feelings of isolation. Unexpected costs arise after a cancer diagnosis, there is a massive financial impact for most families. We will fund for children and young people to get some 'time away' from seeing Mum/Dad at their worst through treatment and go off to 'enjoy' a trip to a farm park, watch a movie, go bowling, jump around at a trampoline park or even some food at the local pizza place.
3. Bringing families together on our Together Time activities to reduce children's isolation. They may be the only child at school whose parent has cancer, but by bringing families together, we are showing them they are not the only ones.
4. Supporting children's emotional well-being as they see their parent go through cancer, through mindfulness tools & respite activities.
5. Providing a one stop shop for advice and information about a cancer diagnosis for a parent with children on how best to support their child/ren, including links to localised services and signposting to other organisations who can offer help.

4- Background and Achievements to Date

4.1- Background

The Osborne Trust was founded after our founder/CEO was diagnosed with cancer age 36 years with children aged 7 & 4 and finding no support on offer for them.

Emma was diagnosed in 2013 and spent 10 months going through cancer treatment, operation, chemotherapy, and radiotherapy, with many hospital stays due to infections and complications. Throughout this time Emma's thoughts were always on how best to support her children. She asked at every appointment was there anything locally or nationally that could support the kids and was met with a brick wall, she found lots of services for herself but nothing specifically focusing on supporting her children through this time.

The family got through it by planning activities around Emma's treatment. Dad would take the kids off to the cinema, a play centre, a farm park so Emma could have some time to rest, and the kids got out of the house from seeing Emma so poorly from her grueling treatment.

At the same time as Emma's treatment, an old family friend was diagnosed with cancer with 3 teenage children and was self-employed with very little income coming in. This got Emma thinking about the financial implications a cancer diagnosis has for a family and how getting a day out or going to the

cinema could be a luxury that stopped when a parent had cancer due to money worries. From there the first ideas for the Trust was born.

Emma finished her treatment in the February of 2014 and once through this she got to work on looking into setting up a charity to support children during a parent's cancer. She asked her own children what they would have found beneficial, one idea was a teddy to cuddle and provide comfort for when Emma was in hospital and Ozzy the Elephant was born.

4.2: The Osborne's Trusts Volunteers and Supporters

The Trust has established a dedicated team of volunteers through our Trustees, Fundraising/Events volunteers, professional advisors, and ambassadors, without whom our charitable activities could not be carried out. These individuals give up their free time to help us continue our work here at the charity. 126 volunteer hours were recorded during this period.

4.3- Partner Organisations

Strong working relationships have been developed with both hospitals, cancer centres and cancer related charities across the UK namely:

- North Wales Cancer Centre- Radiotherapy Department
- The Christie Hospital
- Macmillan Cancer Support Hubs/Officers across the whole of the UK & NI
- Team Verrico
- Mummy's Star
- Breast Care teams across certain parts of the UK
- Specialist Cancer teams/nurses across certain parts of the UK
- NHS Hospitals in (certain parts of the UK)
- Teenage and Young People/Parent services
- Velindre Cancer Care in Cardiff

We have received many referrals from the above organisations. Macmillan teams across the UK & NI remain our biggest referrer, followed closely by breast care nurses across the UK & NI. We have visited a couple of Maggie's Centres & local cancer services in London prior to the opening of a Maggie's Centre here in North Wales at the local cancer centre to discover what they offer and if we can add value to what goes on at these centres to the children of cancer patients.

4.4 Profile

Growth in our profile and charity awareness has been positive thanks to our social media pages and engagement on these. We have received a major boost to our profile over the past year thanks to working with the partnership organisations listed above.

We help any parent we have supported to raise awareness about the Trust and our work in supporting children. By sharing their story across social media channels and the general media they spread the news of who we are and what we do.

5- Our Goals

5.1- 2014-2024

Such has been the growth of the Trust since we first started, we have needed to reflect upon what has been achieved so we can plan accordingly. It is evident that our core support of the local respite activities and our support packs are working well and require little development bar any new products that come on the market which may be beneficial. We have introduced a Worry Bear for children's pockets to fill the gap between anxious thoughts whilst away from the parent undergoing treatment,

Our together time, where we bring families together so children and young people can see they aren't the only ones needs more development as the covid situation has lessened and we can now bring families together again.

Our peer-to-peer support work started in the tail of 2022 and beginning of 2023. Over 30 teens accessed our outdoor activity programme, which included skiing, watersports day, tree top trekking, river assault course, surfing lesson and inflatable fun. This was made possible thanks to funding from the Burbo Bank Extension Community Fund and National Lottery Community Fund in both England and Wales.

We are launching our school holidays programme in 2024, piloted in North Wales and Greater Manchester areas before rolling out further. Children see more and are more aware of what cancer treatment involves for a parent when they are off school and more respite activities was found to be needed so they could have additional time away from what is going on at home for Mum/Dad.

Promotion of what we do needs to increase to enable us to reach many more families than we do presently. We have looked at our map of areas to identify where we have failed to reach over this past year and will do a mail shot to these cancer centres and hospitals, as well as ask our networks via social media if they can deliver leaflets to the hospitals for us.

5.2- Next 12 months

- To continue to provide our support packages to children of ages 3 and over as resources we have stated they are not suitable for the under 3's.
- To fund up to 3 respite local activities for children during a parent cancer.
- Develop a specific programme to support children whose parent is living with an incurable/terminal cancer and/or died from the disease through the beyond support.
- To increase the partner organisations we work closely with so we can reach many more families.
- Look to secure a large grant for running costs for several years from a national funding programme.
- Continue to diversify our income to ensure our long-term sustainability
- Create a volunteer structure which details the opportunities we offer and the benefits of volunteering with us.
- Maintain existing relationship and build new ones with other charities and cancer organisations, especially hospitals in certain regions where the referrals into us is not as high.
- School holidays, especially the long summer break puts added pressure on us here at the Trust, with our most referrals typically being in July as the summer break starts and a specific piece of work is being developed to increase our offer and support during these periods. Additional funding will be applied for.

5.3- 5-year forecast

- Be the go-to service that health/cancer practitioners refer the children of their patients to.
- Reach over 50% of parents who have been diagnosed with cancer and have children living with them.
- Raise 250k in income by 2029.
- Employ coordinators in at least 1 county in England (paid or voluntary capacity).
- Hold at least 6 months operational costs in case of any risk or having to wind the charity down.

- Look at social media/communications officer to manage and run our social pages, communications and keep the website updated either voluntary or paid.

6- Benefit/Need

6.1- What is the benefit/need to the public

Reducing isolation and supporting the emotional wellbeing of the children of a parent with cancer

6.2- Who will benefit

The Trust focuses on supporting children and young where: -

- Mum or Dad is newly diagnosed with cancer
- Mum or Dad is undergoing cancer treatment
- Mum or Dad has a secondary/terminal cancer diagnosis, we will support throughout
- Mum or Dad loses their life from cancer whilst we have supported them in the past will continue supporting them.

6.3- How will they benefit

The Trust seeks to reduce children and young people's isolation and support their emotional and mental wellbeing when Mum or Dad is going through cancer by: -

- Funding up to the 3 local respite activities to reduce their isolation
- Bring children and young people together with others to reduce their isolation
- Relieve some of the financial burdens incurred because of the cancer diagnosis
- Advise and support children and young to look after their mental and emotional wellbeing through our support packages
- Advise, support, and share knowledge to support a parent with children going through cancer.
- Offer peer to peer mentoring support through outdoor based activities.
- Refer to relevant organisations which can provide additional support such as counselling for the children and young people.

6.4 What similar services/organisations are currently available?

We haven't been able to find any other cancer charity that works across the UK and Northern Ireland that the onus is on the kids (and not the cancer patient) and whose sole focus is on supporting children and young people during a parent's cancer. We have found a couple of other charities fund an activity/day out, but they provide support to children whose parent and or sibling have cancer and are memory making days as opposed to giving the children some respite from what is going on at home.

Cancer is being diagnosed more in the under 50's age groups, where a high number will be parents, whilst lots of other organisations have a leaflet or a section on their website for these patients, other charities are not able to address or provide specific help or solutions like us, which are: -

- The alleviation of isolation for children and young people seeing a parent go through cancer
- Funding respite activities and support packs for these families to ease short term hardship.

Some organisations and charities offer children and young people's open days, but we found this to be a few times a year with the focus still being on the cancer patient as opposed to their children. Additionally, most of these are for those aged 8 and over and seem to meet some of the need for the 8-12 year olds but not the under 8's or those going into the teenage years.

6.5- How we work with other providers

Referral systems are in place for other organisations to refer cancer patients who are parents to anyone under 18 to us, which in turn will help those charities to provide next step support via the services we offer.

Please refer to section 4.3 on who we are already working with.

7- Performance Monitoring

7.1- Key Performance Indicators (KPI's)

- Number of support packs posted out to children and young people who meet our specific criteria.

- Number of local respite activities funded.
- Sufficient funds to meet support packs and activities raised.
- Number of children and young people receiving our advice and support.
- Number of social media followers and page follows
- Number of different healthcare providers/organisations and charities referring families to us.
- Number of new charities and organisations worked with.
- Number of counties across the UK & NI where we have supported children/families.

7.2- Measurement of KPI's

- Support packs sent out are documented with the evidence and agreed criteria adhered to.
- Number of local respite activities documented (including cost), evidence and agreed criteria adhere to
- Funds are available and accessible to CEO/Coordinator and treasurer.
- Documentation is available and clear/can be explained. Suitable for children and young people to receive and understand.
- Requests are responded to within 10 days. Continuity of responder ideally where possible
- More referrals from new healthcare providers/organisations.
- More likes/follows on Facebook, Twitter & Instagram.
- More requests for support received.
- Named contact on behalf of The Osborne Trust and the children & young people we support.
- Data is kept on all areas of the UK & NI we have provided support via a map.

7.3- Reporting of KPI's

- Documentation and CEO/Coordinator reporting to chair and trustees.
- Report back to quarterly meetings
- CEO/Treasurer's report to Trustees and CEO updating on fundraising activities
- CEO reports to Chair
- Evidence trails on social media channels/emails.
- CEO/ relevant trustees to report at meetings.
- CEO to provide update at meetings when appropriate.

8- Promotion/Marketing

8.1- How and where we promote our work

See Communications Plan

8.2- Current activity

A lot of our promotion and advertising is done across our social media channels (Facebook, Instagram & X) Facebook has been our most successful, with over 5,000 followers and generated a lot of revenue through their fundraising avenues on the page. X (previously twitter) has been beneficial in creating links with NHS Trusts, practitioners, and other cancer services. Doing more on Linked in will be a focus going forward, it's not something we have maximized at present. Tik Tok is not somewhere we have a presence on at the moment and this will be discussed at future meetings as to whether this is needed.

8.3 Website

In 2022/2023 we carried out a complete overhaul of our website so it's easy for the patient to access support for their kids and for the health practitioners to refer the families they are supporting over. Our new website was launched in June 2022. Additionally, we want to maximize what we have been up to and what we have and are doing in terms of support and fundraising through the site. We receive a number of emails and calls from the website as we come up on the first page when a google search occurs.

9- The Organisation

9.1- Board of Trustees

The following trustees were active during the year ending June 30th 2023

<u>Name</u>	<u>Position</u>	<u>Appointed</u>	<u>Resigned</u>
<u>Clare Griffiths</u>	<u>Chair Trustee</u>	<u>7th Dec 2014</u>	<u>N/A</u>
<u>Anwen Maher</u>	<u>Trustee</u>	<u>21st Nov 2019</u>	<u>N/A</u>
<u>Helen Daniels</u>	<u>Trustee</u>	<u>14th May 2021</u>	<u>N/A</u>
<u>Nicky Grayston</u>	<u>Trustee</u>	<u>20th Feb 2018</u>	<u>N/A</u>
<u>Jayne Rea</u>	<u>Trustee</u>	<u>1st July 2021</u>	<u>29/10/24</u>
<u>Sioned Davies</u>	<u>Trustee</u>	<u>21st Nov 2019</u>	<u>N/A</u>
<u>Angela Evans</u>	<u>Treasurer/Trustee</u>	<u>20th Feb 2018</u>	<u>N/A</u>

<u>Kelly Angus</u>	<u>Trustee</u>	<u>1st Oct 202</u> <u>1</u>	<u>29/10/24</u>
<u>Jennifer Bright</u>	<u>Trustee</u>	<u>29th Oct 2024</u>	
<u>Bella Dures-Varle</u>	<u>Trustee</u>	<u>29th Oct 2024</u>	<u>N/A</u>

9.2- Staff

Emma Osborne Founder/CEO/Charity Coordinator

9.3- Volunteers

Due to the nature of The Trust, how we work and the fact we operate all over the UK virtually/remotely, our volunteer offer differs to other organisations.

Volunteering can often be through our fundraising events within the community as well as admin support and visiting hospitals all over the UK with our posters and leaflets.

9.4- Premises

The Trust currently has no accommodation assets.

9.5- New equipment and consumables

New equipment and consumables to enable the Trust to carry out its work will be purchased as necessary but will always seek to attain value for money.

Consumables to enable the Trust to carry out its work will be purchased as necessary but will always seek to attain value for money.

9.6- Policies and Procedures

The Trust has active policies covering the following: -

- Safeguarding
- Financial Management
- Reserves Policy
- Volunteer Policy
- Risk Management
- GDPR & Data Protection
- Privacy Policy

- Equality and Diversity
- Welsh Language
- Trustee Expenses
- Trustees Code of Conduct
- Health & Safety Policy

9.7- Risk

Please see Risk Management Policy

9.8- Trustees Recruitment/Appointment

Where vacancies arise on the board of trustees, a public advert will be made outlining the role, time and skills required and the nature of what being a trustee means in full, in line with guidance by the Charities Commission.

Officers' roles of the board are elected at the AGM.

10- Fundraising Strategy

10.1 General Funds

The Trust will seek to increase fundraising levels on 2023-2024 and will seek to develop fundraising strategy to provide greater structure and long-term security.

Grants and funding will be applied for as in previous years.

10.2 Trading

The Trust trades on pre purchased, branded goods namely hoodies, pens, wristbands, mugs, coasters, tote bags and cards. Additionally, Ozzy the Elephant teddies (sent for free to children we support) which can be purchased alongside other animal teddies to plough back monies into the trust. These items are traded via our website www.theosbornetrust.com, and on social media pages. Some branded merchandise is given to fundraising events and fundraisers for free to help raise awareness and funds for The Osborne Trust.

11- Trustees Report

Please refer to full report at the end of this document.

Disclosure of information to independent examiners

Each person who was a Trustee at the time this report was approved confirms that:

- so far as she is aware, there is no relevant information of which the Charity's independent examiner is unaware; and
- she has taken all the steps that she ought to have taken as a Trustee to make herself aware of any relevant information and to establish that the Charity's independent examiner is aware of that information.

This report was approved by the board on 11/11/2025 and signed on behalf.

Clare Griffiths Chair of Board of Trustees

12- Charity Information

Trustees

<u>Name</u>	<u>Position</u>	<u>Appointed</u>	<u>Resigned</u>
<u>Clare Griffiths</u>	<u>Chair Trustee</u>	<u>7th Dec 20 14</u>	<u>N/A</u>
<u>Anwen Maher</u>	<u>Trustee</u>	<u>21st Nov 2 019</u>	<u>N/A</u>
<u>Helen Daniels</u>	<u>Trustee</u>	<u>14th May 2021</u>	<u>N/A</u>
<u>Nicky Grayston</u>	<u>Trustee</u>	<u>20th Feb 2 018</u>	<u>N/A</u>
<u>Jennifer Bright</u>	<u>Trustee</u>	<u>29th Oct 2024</u>	<u>N/A</u>
<u>Sioned Davies</u>	<u>Trustee</u>	<u>21st Nov 2 019</u>	<u>N/A</u>
<u>Angela Evans</u>	<u>Treasurer/Trustee</u>	<u>20th Feb 2 018</u>	<u>N/A</u>
<u>Bella Dures-Varle</u>	<u>Trustee</u>	<u>29th Oct 2024</u>	<u>N/A</u>

Independent Examiner

Michelle Ellis
TJC Accounting
Maes Y Gog
Rhyl
Denbighshire
LL18 4QA

Registered Offices

PO Box 349
Rhyl
Denbighshire
LL18 9HX

Registered Charity Number

1160073

13- Independents Examiners Report

Please see Unaudited Accounts Report

14- Financial Statement

Please see Unaudited Accounts Report

Balance Sheet

Please see Unaudited Accounts Report

Approved Clare Griffiths

Signature C L GRIFFITHS

Date 11/11/25

Trustees' Annual Report for the period						
From	Period start date			To	Period end date	
	01	JULY	2024		30	JUNE

Charity name

THE OSBORNE TRUST

Other names charity is known by

Registered charity number (if any)

1160093

Charity's principal address

PO BOX 349

RHYL

DENBIGHSHIRE

Postcode

LL18 9HX

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	CLARE GRIFFITHS	CHAIR		
2	ANWEN MAHER			
3	SIONED DAVIES			
4	ANGELA EVANS			
5	NICOLA GRAYSTON			
6	HELEN DANIELS			
7	KELLY ANGUS		01/07/24-29/10/24	
8	JAYNE REA		01/07/24-29/10/24	
9	JENNIFER BRIGHT		29/10/24 AND ONGOING	
10	BELLA DURES-VARLE		29/10/24 AND ONGOING	
11				
12				
13				
14				
15				
16				

17			
18			
19			
20			

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

<u>Type of adviser</u>	Name	Address

Name of chief executive or names of senior staff members (Optional information)

EMMA OSBORNE

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	TRUST DEED
How the charity is constituted (eg. trust, association, company)	TRUST
Trustee selection methods (eg. appointed by, elected by)	APPOINTED BY EMMA OSBORNE – RECRUITMENT PROCESS

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

PLEASE REFER TO FULL ANNUAL REPORT.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

The Trusts objects, as listed on the Charity Commission are specifically related to the following:

The relief of sickness and need, and the preservation of health for children affected by their parent's cancer:

- d) To provide children and young people aged 16 years and under whose parents have cancer some time out activities during their parent's cancer treatment by funding these activities.
- e) For the provision of activities that will bring comfort to children under 16 years of age whilst their parents have cancer, which will in turn have a beneficial effect on the well-being of the family during this time.
- f) To fund the provision of leisure services/activities for children and young

people where the parent has cancer, such as plays centre activities, cinema tickets bowling passes etc. to relieve the stress placed upon families

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The Osborne Trust is now in its 10th year and is still the only charity focusing solely on supporting children during a parent's cancer across the whole of the UK & NI. Our core support programme of funding local leisure/respice activities to allow the children some timeout during their parent's cancer. We provided support packages funded by donations, fundraising and some grant funding. All our support services are provided free of charge to families.

The funds raised by The Osborne Trust is generated by charity led fundraising activities, sales of branded merchandise, as well as our Ozzy & friends teddies and accessories. Alongside this, fundraising and donations from individuals, community groups and businesses as well as sourcing grants and funding wherever possible. Grant funding was secured this year from the following, National Lottery Community Fund for England and Wales, Tesco Stronger Starts programme overseen by Groundworks for Abergele Store.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Please refer to the full annual report.

Summary of the main achievements of the charity during the year

Our year started with a celebration ball for reaching 10 years of providing support. Several items for the ball were funded by businesses such as ACT Ltd, LAR Ltd, P & T Drainage.

We have been supported by several local organisations, schools and groups over this past 12 months such as Rhyl & District Guides, Blue Knights Wales, Qioptic St Asaph, Rhyl High School, Co-op local cause, Prestatyn Walking Club, Ladies Fellowship, Curry's Store Rhyl, St David's College Llandudno and Rhyl Fire Brigade Recreation Club.

Additionally we have had a lot of support from UK based organisations, schools, clubs and groups such as a Gym in Manchester, KAS Electrical, New Balance, Rowlinsons Solicitors, Southend School for boys, Codford Village Fete, Vastus Fitness, Yorkshire Building Society, Park Retail, Breast Unit in Birmingham, ACT Ltd, Sir Thomas Freemans School, Newbridge Prep School and Pears Foundation.

Fundraising over the past 12 months have included our birthday ball, Emma's 10 challenges for 10 years, golf football, fun days, running events, walking a mile every day in January, birthday fundraising, ultra marathons, rugby, walking and football

Several parents of the children we have supported over the past year have gone on to fundraise for us through pool competitions, entering marathons, doing triathlons and holding coffee mornings.

Funds have been used effectively to support our core areas of support. These are reducing isolation for children through a local respite

activity, providing comfort through our Ozzy the Elephant teddy and equipping children and young people with mindfulness tools such as journals, books, flashcards and colouring to assist their emotional well-being.

Planning has started on what we will do as a Trust regarding community fundraising in 2025/2026 and we have secured 2 running places at London Marathon from 2026 for 4 years.

Our profile about what we do and who we support has increased significantly amongst both the medical/cancer sector, the public and most notably schools across the UK. This is evident in the number of referrals we get each year. Notable increases of referrals this year compared to last year are from South Wales, Northumberland, Derbyshire, Devon and London. Some numbers have declined in certain areas such especially Scotland and work is ongoing in reaching the services in these areas.

We find once a Macmillan Information Officer, Breast Care Nurse, Cancer Support worker and other staff at cancer centres and hospitals find out about us, referrals increase dramatically for a county/area.

We have strengthened our close working relationships with others in the areas where we see a high rate of referrals coming in, such as the radiotherapy department at North Wales Cancer Centre.

Work took place to establish closer working links with the chemotherapy department locally as Emma was having treatment there and reminded the staff of what the Trust offers. Our charity founder and a volunteer went to London to meet with Maggie's centres down there to see what

Section D**Achievements and performance**

was on offer in anticipation of what is to come in North Wales Cancer Centre one and to visit cancer organisations with access to patients who can be referred over to us for their children to access support.

Section E**Financial review**

Brief statement of the charity's policy on reserves

We hold a minimum of 6 months in reserves and a maximum of 12 months. We are currently operating at 10.5 months figures.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Please refer to the Accounts provided alongside this annual report.


Section F**Other optional information**

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Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
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Full name(s)	Clare Louise Griffiths	
---------------------	------------------------	--

Position	Chair	
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Date	11/11/25
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THE OSBORNE TRUST
Charity Number: 1160073
UNAUDITED ACCOUNTS
FOR THE YEAR ENDED 30 JUNE 2025

THE OSBORNE TRUST
Charity Number: 1160073

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number:
1160073

Correspondence Address:
PO Box 349
Rhyl
Denbighshire
LL18 4FP

Trustees/Committee

C Griffiths	(Chairperson)
A Evans	(Treasurer)
H Daniels	
N Grayson	
A Maher	
S Davies	
K Angus	(Resigned 29/10/2024)
J Rea	(Resigned 29/10/2024)
J Bright	(Appointed 29/10/2024)
B Dures-Varle	(Appointed 29/10/2024)

Independent Examiner

M Ellis
TJC Bookkeeping Solutions
Grange Road
Rhyl
Denbighshire
LL18 4BY

THE OSBORNE TRUST
Charity Number: 1160073

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 30 JUNE 2025

	Restricted Funds £	Unrestricted Funds £	Total Funds 2025 £	Total Funds 2024 £
A1: INCOMING RESOURCES				
Fundraising		102,245	102,245	54,241
Donations		13,219	13,219	29,350
Sales		1,017	1,017	1,269
Restricted Grants Received	41,000		41,000	11,080
Unrestricted Grants Received		0	0	0
A2: ASSET AND INVESTMENT SALES				
Total incoming resources	<u>41,000</u>	<u>116,481</u>	<u>157,481</u>	<u>95,940</u>
A3: RESOURCES EXPENDED				
Fundraising Costs		15,582	15,582	10,244
Supplies (Ozzy)/Supporting Costs	817	2,235	3,051	3,639
Marketing		294	294	1,695
Website		270	270	270
Journals/Books		6,676	6,676	6,318
Family Activities	3,302	15,015	18,318	16,826
Lockdown Activities/At Home/Shielding	1,514	722	2,236	709
Together Time	0	-223	-223	1,183
Subscription		0	0	562
Office Costs		2,195	2,195	3,377
Insurance	518	0	518	503
Accountancy		1,573	1,573	1,362
Postage	950	2,622	3,572	3,515
Staff Costs	21,305	30,741	52,046	55,328
Training		0	0	0
Volunteer Expenses		612	612	452
Cost of sales		192	192	1,275
Legal and Professional		333	333	0
Bank Charges		81	81	70
Total Resources Expended	<u>28,406</u>	<u>78,920</u>	<u>107,326</u>	<u>107,328</u>
A4: ASSET AND INVESTMENT PURCHASES				
	1,899	1,725	3,624	0
	<u>1,899</u>	<u>1,725</u>	<u>3,624</u>	<u>0</u>

THE OSBORNE TRUST
Charity Number: 1160073

OPERATING PROFIT / (LOSS)	10,695	35,836	46,531	(11,388)
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Transfers between funds

Balances Brought forward 1 July 2024	6,823	95,615	102,438	113,826
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Balances Brought forward 30 June 2025	17,518	131,451	148,969	102,438
--	--------	---------	---------	---------

	Restricted Funds £	Unrestricted Funds £	Total Funds 2025 £	Total Funds 2024 £
B1: CASH FUNDS				
Current Account	17,518	131,451	148,969	102,438
B2: OTHER MONETARY ASSETS		0	0	0
B3: INVESTMENT ASSETS		0	0	0
Total Current Assets	17,518	131,451	148,969	102,438

B4: ASSETS RETAINED FOR THE CHARITIES OWN USE

	Funds to which asset belongs	Cost	Current Value
Photo Printer	Office Equipment	120	20
Ipad Pro	Office Equipment	797	167
IMac	Office Equipment	1,120	294
Office furniture	Furniture & fixtures	143	0
IPAD	Office Equipment	619	317
MacBook Pro 14"	Office Equipment	1,556	1,556
IMac Pink	Office Equipment	2,068	2,068
		6,423	4,422

B5: LIABILITIES	0	0	0	0
	0	0	0	0

Signed by one (or two) trustees on behalf of all the trustees.

Signature: 

Print Name CLARE GRIFFITHS

Date of approval: 02/12/25

Signature: _____

Print Name: _____

Date of approval: _____

THE OSBORNE TRUST
Charity Number: 1160073

INDEPENDENT EXAMINER'S REPORT

FOR THE YEAR ENDED 30 JUNE 2025

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE OSBORNE TRUST.

I report on the financial statements of the charity for the year ended 30 June 2025 which are set out on pages 3 to 4.

RESPECTIVE RESPONSIBILITIES OF THE TRUSTEES AND EXAMINER

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act"). I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 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.

BASIS OF THE INDEPENDENT EXAMINER'S REPORT

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

INDEPENDENT EXAMINER'S STATEMENT

I have completed my examination, and I confirm that no material matters have come to my attention

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



.....
Michelle Ellis
68 Grange Road
Rhyl
Denbighshire
LL18 4BY

Trustees' Annual Report for the period

	Period start date		Period end date	
From	01	JULY	2024	To
	30	JUNE	2025	

Section A Reference and administration details

Charity name THE OSBORNE TRUST

Other names charity is known by

Registered charity number (if any) 1160093

Charity's principal address

PO BOX 349
RHYL
DENBIGHSHIRE
Postcode LL18 9HX

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	CLARE GRIFFITHS	CHAIR		
2	ANWEN MAHER			
3	SIONED DAVIES			
4	ANGELA EVANS			
5	NICOLA GRAYSTON			
6	HELEN DANIELS			
7	KELLY ANGUS		01/07/24-29/10/24	
8	JAYNE REA		01/07/24-29/10/24	
9	JENNIFER BRIGHT		29/10/24 AND ONGOING	
10	BELLA DURES-VARLE		29/10/24 AND ONGOING	
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

EMMA OSBORNE

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	TRUST DEED
How the charity is constituted (eg. trust, association, company)	TRUST
Trustee selection methods (eg. appointed by, elected by)	APPOINTED BY EMMA OSBORNE – RECRUITMENT PROCESS

Additional governance issues (Optional information)

<p>You may choose to include additional information, where relevant, about:</p> <ul style="list-style-type: none"> • policies and procedures adopted for the induction and training of trustees; • the charity's organisational structure and any wider network with which the charity works; • relationship with any related parties; • trustees' consideration of major risks and the system and procedures to manage them. 	PLEASE REFER TO FULL ANNUAL REPORT.
--	-------------------------------------

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The Trusts objects, as listed on the Charity Commission are specifically related to the following:

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Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The Osborne Trust is now in its 10th year and is still the only charity focusing solely on supporting children during a parent's cancer across the whole of the UK & NI. Our core support programme of funding local leisure/respite activities to allow the children some timeout during their parent's cancer. We provided support packages funded by donations, fundraising and some grant funding. All our support services are provided free of charge to families.

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You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.

Please refer to the full annual report.

Section D

Achievements and performance

Summary of the main achievements of the charity during the year

Our year started with a celebration ball for reaching 10 years of providing support. Several items for the ball were funded by businesses such as ACT Ltd, LAR Ltd, P & T Drainage.

We have been supported by several local organisations, schools and groups over this past 12 months such as Rhyl & District Guides, Blue Knights Wales, Qioptic St Asaph, Rhyl High School, Co-op local cause, Prestatyn Walking Club, Ladies Fellowship, Curry's Store Rhyl, St David's College Llandudno and Rhyl Fire Brigade Recreation Club.

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Planning has started on what we will do as a Trust regarding community fundraising in 2025/2026 and we have secured 2 running places at London Marathon from 2026 for 4 years.

Our profile about what we do and who we support has

Section D

Achievements and performance

increased significantly amongst both the medical/cancer sector, the public and most notably schools across the UK. This is evident in the number of referrals we get each year. Notable increases of referrals this year compared to last year are from South Wales, Northumberland, Derbyshire, Devon and London. Some numbers have declined in certain areas such as especially Scotland and work is ongoing in reaching the services in these areas.

We find once a Macmillan Information Officer, Breast Care Nurse, Cancer Support worker and other staff at cancer centres and hospitals find out about us, referrals increase dramatically for a county/area.

We have strengthened our close working relationships with others in the areas where we see a high rate of referrals coming in, such as the radiotherapy department at North Wales Cancer Centre.

Work took place to establish closer working links with the chemotherapy department locally as Emma was having treatment there and reminded the staff of what the Trust offers. Our charity founder and a volunteer went to London to meet with Maggie's centres down there to see what was on offer in anticipation of what is to come in North Wales Cancer Centre one and to visit cancer organisations with access to patients who can be referred over to us for their children to access support.

Section E

Financial review

Brief statement of the charity's policy on reserves

We hold a minimum of 6 months in reserves and a maximum of 12 months. We are currently operating at 10.5 months figures.

Details of any funds materially in deficit

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any

Please refer to the Accounts provided alongside this annual report.

ethical investment policy
adopted.

--

Section F

Other optional information

--

Section G

Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

	
---	--

Full name(s)

Clare Louise Griffiths	
------------------------	--

Position (eg Secretary, Chair,
etc)

Chair	
-------	--

Date

11/11/25

THE OSBORNE TRUST

England & Wales - Charity number 1160073

Accounts

ANNUAL REPORT 2023-2024

CHARITY NUMBER IN ENGLAND & WALES 1160073



**SUPPORTING CHILDREN DURING A PARENT'S CANCER & BEYOND
ACROSS THE UK**

JULY 2023-JUNE 2024



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1- Executive Summary

The Osborne Trust (the 'Charity') is a registered charity in England and Wales (1160073).

Founded in July 2014 from Rhuddlan in North Wales and operates throughout the UK & Northern Ireland, with majority of its work taking place in England and Wales. The Osborne Trust now has its headquarters in Rhyl in North Wales.

1.1 Rationale

The charity was set up in response to a lack of support for children during a parent's cancer. The founder has personal experience of being diagnosed with cancer with 2 young children. Her encounter of finding no support for her own children generated her desire to provide other children whose Mum/Dad have cancer with the support she found lacking for her 2.

The Osborne Trust mission statement has now changed since our inception and now encompasses support for children who have seen a parent die from cancer.

Supporting children during a parent's cancer & beyond

And priority goes to supporting families where: -

- a) Children (by children we mean those who are 18 years and younger) living with a parent who has a cancer diagnosis, is having cancer treatment, seen a cancer recurrence, living with incurable cancer and if applicable seen a parent die from this disease.

The Osborne Trust vision is:

Every child who sees a parent go through cancer can access emotional and practical support from the Trust.

1.2 Structure

The Osborne Trust currently has one full time staff member and a strong board of trustees/management committee drawn from various sectors with a wide range of skills and expertise, in addition to a personal experience of cancer. The current staff team consists of a CEO/Charity Manager.

All trustees provide their time in a voluntary capacity.

1.3 July 2023-June 2024

The Osborne Trust is now in its 9th year and is still the only charity focusing solely on supporting children during a parent's cancer across the whole of the UK & NI. Our core support programme of funding local respite activities and packages we provide are funded entirely by donations, fundraising and some grant funding. All our support services are provided free of charge to families.

The funds raised by The Osborne Trust is generated by charity led fundraising activities, sales of branded merchandise, as well as our Ozzy & friends teddies and accessories. Alongside this, fundraising and donations from individuals, community groups and businesses as well as sourcing grants and funding wherever possible.

Funds have been used effectively to support our core areas of support. These are reducing isolation for children through a local respite activity, providing comfort through our Ozzy the Elephant teddy and equipping children and young people with mindfulness tools such as journals, books, flashcards and colouring to assist their emotional well-being.

Our profile about what we do and who we support has increased significantly amongst both the medical/cancer sector and the public. This is evident in the number of children we have supported this year, 824 children this year from 710 the previous year, an increase of 14%

We have seen an increase in referrals from new areas/counties. We find once a Macmillan Information Officer, Breast Care Nurse, Cancer Support worker and other staff at cancer centers and hospitals find out about us, referrals increase dramatically for a county/area. We have strengthened our close working relationships with others in the areas where we see a high rate of referrals coming in, such as the radiotherapy department at North Wales Cancer Centre. There are some areas that need revisiting in our next year. Referrals have decreased in Merseyside and the contact we have there has left her role, we are working to find it who her replacement is. We will be focusing on getting out information back out to Scotland as referrals there has decreased dramatically this year compared to previous years. Referrals have increased in the counties of Leicestershire, Somerset, West Midlands and Staffordshire to previous years.

The families we have supported are also important ambassadors for us to help promote to the work we do.

1.4 2021-2026

As The Osborne Trust moves into its 10th year and beyond, much of our work will be around increasing the number of children and young people we support and tailoring this support to their needs from their feedback. Our work continues to be led by the children and young people we support. Our strategic aims over the next 5 years are as follows:

- To continue to support children and young people through our core support programmes.
- To offer high school aged children access to peer to peer support through activity-based group exercise and activities.
- To ensure cancer patients who are parents to under 18-year-olds receive consistent and accurate advice regarding support on offer for their children.
- To ensure families are signposted to FREE support programmes and packages to assist their children during their cancer and not signposted to those where they must pay for any support for their children.
- To increase the number of staff to meet the increasing demand and geographical spread of our work.
- To create and manage a volunteer structure and corresponding policy.
- To develop a support programme for those children who experience a parent living with incurable/terminal cancer and/or die from cancer.

Specific goals for the next 5 years are set out in section 5

Emma Osborne Founder/CEO/Charity Coordinator

2- Organisational Details

2.1 Charity Name

The Osborne Trust

2.2 Registered Address

Po Box 349, Rhyl, Denbighshire, LL18 9HX, Wales

2.3 Correspondence Address

Po Box 349, Rhyl, Denbighshire, LL18 9HX, Wales

2.4 Telephone Number

07712 089273

2.5 Email

the-osborne-trust@outlook.com

2.6 Website

www.theosbornetrust.com

2.7 Legal Status

Registered Charity in England and Wales No: 1160073

HMRC Charities Ref: EW29751

Member of the Fundraising Regulator

2.8 Objects

The Trusts objects, as listed on the Charity Commission are specifically related to the following:

The relief of sickness and need, and the preservation of health for children affected by their parent's cancer:

- a) To provide children and young people aged 16 years and under whose parents have cancer some time out activities during their parent's cancer treatment by funding these activities.
- b) For the provision of activities that will bring comfort to children under 16 years of age whilst their parents have cancer, which will in turn have a beneficial effect on the well-being of the family during this time.
- c) To fund the provision of leisure services/activities for children and young people where the parent has cancer, such as plays centre activities, cinema tickets bowling passes etc. to relieve the stress placed upon families during cancer treatment by paying for these to take place.

3- The Osborne Trust

3.1 Vision

To support every child & young person living with a parent undergoing cancer treatment & beyond.

3.2 Mission Statement

Supporting children during a parent's cancer treatment & beyond.

To achieve this as a charity we aim to reduce children and young people's isolation, provide mindfulness tools to feel better able to cope and provide emotional support through our core support programmes and packages.

3.3 Values

The work of The Osborne Trust reflects the key principles and values of the Charity, upheld by its Board of Trustees- confidentiality, transparency, equal opportunities for all and the unique circumstances of each person/family supported.

3.4 What we do

Charitable activities are provided through 5 main priorities:

1. Offering each child referred into our service a support pack made up of items they identify they need such as our Ozzy teddy for comfort, journaling for mindfulness, flashcards for younger children and colouring.
2. Funding local respite activities to reduce children's feelings of isolation. Unexpected costs arise after a cancer diagnosis, there is a massive financial impact for most families. We will fund for children and young people to get some 'time away' from seeing Mum/Dad at their worst through treatment and go off to 'enjoy' a trip to a farm park, watch a movie, go bowling, jump around at a trampoline park or even some food at the local pizza place.

3. Bringing families together on our Together Time activities to reduce children's isolation. They may be the only child at school whose parent has cancer, but by bringing families together, we are showing them they are not the only ones.
4. Supporting children's emotional well-being as they see their parent go through cancer, through mindfulness tools & respite activities.
5. Providing a one stop shop for advice and information about a cancer diagnosis for a parent with children on how best to support their child/ren, including links to localised services and signposting to other organisations who can offer help.

4- Background and Achievements to Date

4.1- Background

The Osborne Trust was founded after our founder/CEO was diagnosed with cancer age 36 years with children aged 7 & 4 and finding no support on offer for them.

Emma was diagnosed in 2013 and spent 10 months going through cancer treatment, operation, chemotherapy, and radiotherapy, with many hospital stays due to infections and complications. Throughout this time Emma's thoughts were always on how best to support her children. She asked at every appointment was there anything locally or nationally that could support the kids and was met with a brick wall, she found lots of services for herself but nothing specifically focusing on supporting her children through this time.

The family got through it by planning activities around Emma's treatment. Dad would take the kids off to the cinema, a play centre, a farm park so Emma could have some time to rest, and the kids got out of the house from seeing Emma so poorly from her grueling treatment.

At the same time as Emma's treatment, an old family friend was diagnosed with cancer with 3 teenage children and was self-employed with very little income coming in. This got Emma thinking about the financial implications a cancer diagnosis has for a family and how getting a day out or going to the cinema could be a luxury that stopped when a parent had cancer due to money worries. From there the first ideas for the Trust was born.

Emma finished her treatment in the February of 2014 and once through this she got to work on looking into setting up a charity to support children during a parent's cancer. She asked her own children what they would have found

beneficial, one idea was a teddy to cuddle and provide comfort for when Emma was in hospital and Ozzy the Elephant was born.

4.2: The Osborne's Trusts Volunteers and Supporters

The Trust has established a dedicated team of volunteers through our Trustees, Fundraising/Events volunteers, professional advisors, and ambassadors, without whom our charitable activities could not be carried out. These individuals give up their free time to help us continue our work here at the charity. 126 volunteer hours were recorded during this period.

4.3- Partner Organisations

Strong working relationships have been developed with both hospitals, cancer centres and cancer related charities across the UK namely:

- North Wales Cancer Centre
- The Christie Hospital
- Macmillan Cancer Support Hubs/Officers across the whole of the UK & NI
- Team Verrico
- Mummy's Star
- Breast Care teams across certain parts of the UK
- Specialist Cancer teams/nurses across certain parts of the UK
- NHS Hospitals in (certain parts of the UK)
- NHS GP Surgeries (in certain parts of the UK)
- Teenage and Young People/Parent services
- Velindre Cancer Care in Cardiff

We have received many referrals from the above organisations. Macmillan teams across the UK & NI remain our biggest referrer. Back in May we attended a Parenting with Cancer Conference and Emma was able to connect with existing networks and forge new ones, especially with Marie Curie, hospices and palliative services across the North West of England & Yorkshire. A number of zoom sessions has taken place with services to connect and increase our reach amongst organisations working with cancer patients.

4.4 Profile

Growth in our profile and charity awareness has been positive thanks to our social media pages and engagement on these. We have received a major boost

to our profile over the past year thanks to working with the partnership organisations listed above and being a charity of the year for a solicitors firm based in Cheshire.

We help any parent we have supported to raise awareness about the Trust and our work in supporting children. By sharing their story across social media channels and the general media they spread the news of who we are and what we do.

5- Our Goals

5.1- 2014-2023

Such has been the growth of the Trust since we first started, we have needed to reflect upon what has been achieved so we can plan accordingly. It is evident that our core support of the local respite activities and our support packs are working well and require little development bar any new products that come on the market which may be beneficial. We have introduced a Worry Bear for children's pockets to fill the gap between anxious thoughts whilst away from the parent undergoing treatment,

Our together time, where we bring families together so children and young people can see they aren't the only ones needs more development as the covid situation has lessened and we can now bring families together again.

Our peer-to-peer support work started in the tail of 2022 and beginning of 2023. Over 30 teens accessed our outdoor activity programme, which included skiing, watersports day, tree top trekking, river assault course, surfing lesson and inflatable fun. This was made possible thanks to funding from the Burbo Bank Extension Community Fund and National Lottery Community Fund in both England and Wales.

Promotion of what we do needs to increase to enable us to reach many more families than we do presently. We have looked at our map of areas to identify where we have failed to reach over this past year and will do a mail shot to these cancer centres and hospitals, as well as ask our networks via social media if they can deliver leaflets to the hospitals for us.

5.2- Next 12 months

- To continue to provide our support packages to children of ages 3 and over as resources we have stated they are not suitable for the under 3's.
- To fund up to 3 respite local activities for children during a parent cancer.
- Develop a specific programme to support children whose parent is living with an incurable/terminal cancer and/or died from the disease through our beyond support.
- To increase the partner organisations we work closely with so we can reach many more families.
- Look to secure a large grant for running costs for several years from a national funding programme.
- Continue to diversify our income to ensure our long-term sustainability
- Create a volunteer structure which details the opportunities we offer and the benefits of volunteering with us.
- Maintain existing relationship and build new ones with other charities and cancer organisations, especially hospitals in certain regions where our support is not as high.
- School holidays, especially the long summer break puts added pressure on us here at the Trust, with our most referrals typically being in July as the summer break starts and a specific piece of work is being developed to increase our offer and support during these periods. Lottery funding will be applied for to kick start this programme of support.

5.3- 5-year forecast

- Be the go-to service that health/cancer practitioners refer the children of their patients to.
- Reach over 50% of parents who have been diagnosed with cancer and have children living with them.
- Raise 250k in income by 2029.
- Employ coordinators in at least 2 counties in England (paid or voluntary capacity).
- Hold at least 6 months operational costs in case of any risk or having to wind the charity down.
- Appoint a social media/communications officer to manage and run our social pages, communications and keep the website updated.

6- Benefit/Need

6.1- What is the benefit/need to the public

Reducing isolation and supporting the emotional wellbeing of the children of a parent with cancer

6.2- Who will benefit

The Trust focuses on supporting children and young where: -

- Mum or Dad is newly diagnosed with cancer
- Mum or Dad is undergoing cancer treatment
- Mum or Dad has a secondary/terminal cancer diagnosis, we will support throughout
- Mum or Dad loses their life from cancer whilst we have supported them in the past will continue supporting them.

6.3- How will they benefit

The Trust seeks to reduce children and young people's isolation and support their emotional and mental wellbeing when Mum or Dad is going through cancer by: -

- Funding up to the 3 local respite activities to reduce their isolation
- Bring children and young people together with others to reduce their isolation
- Relieve some of the financial burdens incurred because of the cancer diagnosis
- Advise and support children and young to look after their mental and emotional wellbeing through our support packages
- Advise, support, and share knowledge to support a parent with children going through cancer.
- Offer peer to peer mentoring support through outdoor based activities.
- Refer to relevant organisations which can provide additional support such as counselling for the children and young people.

6.4 What similar services/organisations are currently available?

We haven't been able to find any other cancer charity that works across the UK and Northern Ireland that the onus is on the kids (and not the cancer patient)

and whose sole focus is on supporting children and young people during a parent's cancer.

Cancer is being diagnosed more in the under 50's age groups, where a high number will be parents, whilst lots of other organisations have a leaflet or a section on their website for these patients, other charities are not able to address or provide specific help or solutions like us, which are: -

- The alleviation of isolation for children and young people seeing a parent go through cancer
- Funding respite activities and support packs for these families to ease short term hardship.

Some organisations and charities offer children and young people's open days, but we found this to be a few times a year with the focus still being on the cancer patient as opposed to their children. Additionally, most of these are for those aged 8 and over and seem to meet some of the need for the 8-12 year olds but not the under 8's or those going into the teenage years.

6.5- How we work with other providers

Referral systems are in place for other organisations to refer cancer patients who are parents to anyone under 18 to us, which in turn will help those charities to provide next step support via the services we offer.

Please refer to section 4.3 on who we are already working with.

7- Performance Monitoring

7.1- Key Performance Indicators (KPI's)

- Number of support packs posted out to children and young people who meet our specific criteria.
- Number of local respite activities funded.
- Sufficient funds to meet support packs and activities raised.
- Number of children and young people receiving our advice and support.
- Amount of significant publicity pieces, articles, and adverts
- Number of different healthcare providers/organisations and charities referring families to us.
- Number of new charities and organisations worked with.

- Number of counties across the UK & NI where we have supported children/families.

7.2- Measurement of KPI's

- Support packs sent out are documented with the evidence and agreed criteria adhered to.
- Number of local respite activities documented (including cost), evidence and agreed criteria adhere to
- Funds are available and accessible to CEO/Coordinator and treasurer.
- Documentation is available and clear/can be explained. Suitable for children and young people to receive and understand.
- Requests are responded to within 10 days. Continuity of responder ideally where possible
- More referrals from new healthcare providers/organisations. More likes/follows on Facebook, Twitter & Instagram.
- More requests for support received.
- Named contact on behalf of The Osborne Trust and the children & young people we support.
- Data is kept on all areas of the UK we have provided support via a map.

7.3- Reporting of KPI's

- Documentation and CEO/Coordinator reporting to chair and trustees.
- Report back to quarterly meetings
- CEO/Treasurer's report to Trustees and CEO updating on fundraising activities
- CEO reports to Chair
- Evidence trail on social media channels/emails. CEO/ relevant trustees to report at meetings.
- CEO to provide update at meetings when appropriate.

8- Promotion/Marketing

8.1- How and where we promote our work

See Communications Plan

8.2- Current activity

A lot of our promotion and advertising is done across our social media channels

(Facebook, Instagram & X) Facebook has been our most successful, with over 4,000 followers and generated a lot of revenue through their fundraising avenues on the page. X (previously twitter) has been beneficial in creating links with NHS Trusts, practitioners, and other cancer services. Doing more on Linked in will be a focus going forward, it's not something we have maximized at present. Additionally for 24/25 we need to look at having a presence on Tik Tok.

8.3 Website

In 2022/2023 we carried out a complete overhaul of our website so it's easy for the patient to access support for their kids and for the health practitioners to refer the families they are supporting over. Our new website was launched in June 2022. Additionally, we want to maximize what we have been up to and what we have and are doing in terms of support and fundraising through the site.

9- The Organisation

9.1- Board of Trustees

The following trustees were active during the year ending June 30th 2023

<u>Name</u>	<u>Position</u>	<u>Appointed</u>	<u>Resigned</u>
<u>Clare Griffiths</u>	<u>Chair Trustee</u>	<u>7th Dec 20 14</u>	<u>N/A</u>
<u>Anwen Maher</u>	<u>Trustee</u>	<u>21st Nov 2 019</u>	<u>N/A</u>
<u>Helen Daniels</u>	<u>Trustee</u>	<u>14th May 021</u>	<u>N/A</u>
<u>Nicky Grayston</u>	<u>Trustee</u>	<u>20th Feb 2 018</u>	<u>N/A</u>
<u>Jayne Rea</u>	<u>Trustee</u>	<u>1st July 20 01</u>	<u>N/A</u>
<u>Sioned Davies</u>	<u>Trustee</u>	<u>21st Nov 2 019</u>	<u>N/A</u>
<u>Angela Evans</u>	<u>Treasurer/Trustee</u>	<u>20th Feb 2 018</u>	<u>N/A</u>
<u>Kelly Angus</u>	<u>Trustee</u>	<u>1st Oct 2021</u>	<u>N/A</u>

9.2- Staff

Emma Osborne Founder/CEO/Charity Coordinator

9.3- Volunteers

Due to the nature of The Trust, how we work and the fact we operate all over the UK virtually/remotely, our volunteer offer differs to other organisations.

Volunteering can often be through our fundraising events within the community as well as admin support and visiting hospitals all over the UK with our posters and leaflets.

9.4- Premises

The Trust currently has no accommodation assets.

9.5- New equipment and consumables

New equipment and consumables to enable the Trust to carry out its work will be purchased as necessary but will always seek to attain value for money.

Consumables to enable the Trust to carry out its work will be purchased as necessary but will always seek to attain value for money.

9.6- Policies and Procedures

The Trust has active policies covering the following: -

- Safeguarding
- Financial Management
- Reserves Policy
- Volunteer Policy
- Risk Management
- GDPR & Data Protection
- Privacy Policy
- Equality and Diversity
- Welsh Language
- Trustee Expenses
- Trustees Code of Conduct
- Health & Safety Policy

9.7- Risk

Please see Risk Management Policy

9.8- Trustees Recruitment/Appointment

Where vacancies arise on the board of trustees, a public advert will be made outlining the role, time and skills required and the nature of what being a trustee means in full, in line with guidance by the Charities Commission.

Officers' roles of the board are elected at the AGM.

10- Fundraising Strategy

10.1 General Funds

The Trust will seek to increase fundraising levels on 2023-2024 and will seek to develop fundraising strategy to provide greater structure and long-term security.

Grants and funding will be applied for as in previous years.

10.2 Trading

The Trust trades on pre purchased, branded goods namely hoodies, pens, wristbands, mugs, coasters, tote bags and cards. Additionally, Ozzy the Elephant teddies (sent for free to children we support) which can be purchased alongside other animal teddies to plough back monies into the trust. These items are traded via our website www.theosbornetrust.com, eBay and on social media pages. Some branded merchandise is given to fundraising events and fundraisers for free to help raise awareness and funds for The Osborne Trust.

11- Trustees Report

Please refer to full report at the end of this document.

Disclosure of information to independent examiners

Each person who was a Trustee at the time this report was approved confirms that:

- so far as she is aware, there is no relevant information of which the Charity's independent examiner is unaware; and

- she has taken all the steps that she ought to have taken as a Trustee to make herself aware of any relevant information and to establish that the Charity's independent examiner is aware of that information.

This report was approved by the board on 14/8/2024 and signed on its behalf. Clare Griffiths Chair of Board of Trustees

12- Charity Information

Trustees

<u>Name</u>	<u>Position</u>	<u>Appointed</u>	<u>Resigned</u>
<u>Clare Griffiths</u>	<u>Chair Trustee</u>	<u>7th Dec 20 14</u>	<u>N/A</u>
<u>Anwen Maher</u>	<u>Trustee</u>	<u>21st Nov 2 019</u>	<u>N/A</u>
<u>Helen Daniels</u>	<u>Trustee</u>	<u>14th May 021</u>	<u>N/A</u>
<u>Nicky Grayston</u>	<u>Trustee</u>	<u>20th Feb 2 018</u>	<u>N/A</u>
<u>Jayne Rea</u>	<u>Trustee</u>	<u>1st July 20 01</u>	<u>N/A</u>
<u>Sioned Davies</u>	<u>Trustee</u>	<u>21st Nov 2 019</u>	<u>N/A</u>
<u>Angela Evans</u>	<u>Treasurer/Trustee</u>	<u>20th Feb 2 018</u>	<u>N/A</u>
<u>Kelly Angus</u>	<u>Trustee</u>	<u>1st Oct 2021</u>	<u>N/A</u>

Independent Examiner

Michelle Ellis
TJC Accounting
Maes Y Gog
Rhyl
Denbighshire
LL18 4QA

Registered Offices

PO Box 349
Rhyl
Denbighshire
LL18 9HX

Registered Charity Number

1160073

13- Independents Examiners Report

Please see Unaudited Accounts Report

14- Financial Statement

Please see Unaudited Accounts Report

Balance Sheet

Please see Unaudited Accounts Report

Approved Clare Griffiths

Signature



Date 14/8/2024



Trustees' Annual Report for the period

From	Period start date			Period end date		
	01	JULY	2023	30	JUNE	2024

Charity name

THE OSBORNE TRUST

Other names charity is known by

Registered charity number (if any)

1160093

Charity's principal address

PO BOX 349

RHYL

DENBIGHSHIRE

Postcode

LL18 9HX

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	CLARE GRIFFITHS	CHAIR		
2	ANWEN MAHER			
3	SIONED DAVIES			
4	ANGELA EVANS			
5	NICOLA GRAYSTON			
6	HELEN DANIELS			
7	KELLY ANGUS			
8	JAYNE REA			

Names of the trustees for the charity, if any, (for example, any custodian trustees)

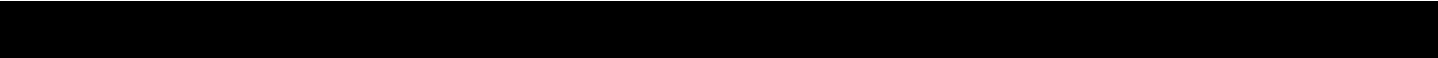
Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

<u>Type of adviser</u>	Name	Address

Name of chief executive or names of senior staff members (Optional information)

EMMA OSBORNE



Description of the charity’s trusts

Type of governing document <small>(eg. trust deed, constitution)</small>	TRUST DEED
How the charity is constituted <small>(eg. trust, association, company)</small>	TRUST
Trustee selection methods <small>(eg. appointed by, elected by)</small>	APPOINTED BY EMMA OSBORNE – RECRUITMENT PROCESS

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees.
- the charity’s organisational structure and any wider network with which the charity works.
- relationship with any related parties.

PLEASE REFER TO FULL ANNUAL REPORT.

- trustees' consideration of major risks and the system and procedures to manage them.



Summary of the objects of the charity set out in its governing document

The Trusts objects, as listed on the Charity Commission are specifically related to the following:

The relief of sickness and need, and the preservation of health for children affected by their parent's cancer:

- d) To provide children and young people aged 16 years and under whose parents have cancer some time out activities during their parent's cancer treatment by funding these activities.
- e) For the provision of activities that will bring comfort to children under 16 years of age whilst their parents have cancer, which will in turn have a beneficial effect on the well-being of the family during this time.
- f) To fund the provision of leisure services/activities for children and young people where the parent has cancer, such as plays centre activities, cinema tickets bowling passes etc. to relieve the stress placed upon families

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The Osborne Trust is now in its 9th year and is still the only charity focusing solely on supporting children during a parent's cancer across the whole of the UK & NI. Our core support programme of funding local leisure/respice activities to allow the children some timeout during their parent's cancer. We provided support packages funded by donations, fundraising and some grant funding. All our support services are provided free of charge to families.

The funds raised by The Osborne Trust is generated by charity led fundraising activities, sales of branded merchandise, as well as our Ozzy & friends teddies and accessories. Alongside this, fundraising and donations from individuals, community groups and businesses as well as sourcing grants and funding wherever possible.

Additional details of objectives and activities (Optional information)

You may choose to include further statements, where relevant, about:

- policy on grantmaking.
- policy programme related investment.
- contribution made by volunteers.

Please refer to the full annual report.

Summary of the main achievements of the charity during the year

Fundraising over the past 12 months have included bucket collection at Wrexham Football club where we launched our new mascot Ozzy the Elephant. Additionally included our annual 12 days of Christmas fundraiser, which remains our biggest fundraiser each year, our annual Xmas boogie bingo locally and our annual walk a mile in their shoes every day throughout January. January and February are usually our most difficult time of the year to fundraise in and was a large factor for creating our January month long walk fundraiser. We have received support locally from Rhyl & Districts Guides, Masonic Group and local motorbike club, as well as across the UK from a gym in Manchester and Solicitors firm in Cheshire. A number of parent's of the children we have supported over the past year have gone on to fundraise for us through pool competitions, entering marathons, doing triathlons and holding coffee mornings.

Funds have been used effectively to support our core areas of support. These are reducing isolation for children through a local respite activity, providing comfort through our Ozzy the Elephant teddy and equipping children and young people with mindfulness tools such as journals, books, flashcards and colouring to assist their emotional well-being.

Planning has started to celebrate our 10th year with a Pink Tie Ball at the venue where we launched the charity 10 years ago. This will be our big fundraising event to kick off our 10th year in July 2024.

Our profile about what we do and who we support has increased significantly amongst both the medical/cancer sector and the public. This is evident in the number of children we have

supported this year, **824 children** this year from **710 the previous year**, an increase of 14%. Notable increases from Leicestershire, Buckinghamshire and Somerset areas compared to previous years. Some numbers have declined in certain areas such as Lincolnshire, Nottinghamshire, Merseyside and parts of Scotland, work is already underway to establish better networks in these areas to increase our reach.

We find once a Macmillan Information Officer, Breast Care Nurse, Cancer Support worker and other staff at cancer centers and hospitals find out about us, referrals increase dramatically for a county/area. We have strengthened our close working relationships with others in the areas where we see a high rate of referrals coming in, such as the radiotherapy department at North Wales Cancer Centre. Work needs to be done to establish closer working links with the chemotherapy department locally and to contact the people behind building the new Maggie's Centre to North Wales. Our charity founder and manager attended a Parenting with Cancer course and has established links with Maggie's centres in London, to increase our support here, also with Marie Curie in Sheffield, where they have already referred a family over to us, Macmillan services in Devon and a hospice in Lancashire to increase our reach in certain postcode areas.

Brief statement of the charity's policy on reserves

We hold a minimum of 6 months in reserves and a maximum of 12 months. We are currently operating at 10.5 months figures.

Details of any funds materially in deficit

--

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Please refer to the Accounts provided alongside this annual report.


Section F

Other optional information

--

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Clare Louise Griffiths	
Position (eg Secretary, Chair, etc)	Chair	
Date	14/08/24	

THE OSBORNE TRUST
Charity Number: 1160073
UNAUDITED ACCOUNTS
FOR THE YEAR ENDED 30 JUNE 2024

THE OSBORNE TRUST
Charity Number: 1160073

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number:

1160073

Correspondence Address:

PO Box 349
Rhyl
Denbighshire
LL18 4FP

Trustees/Committee

C Griffiths (Chairperson)
H Daniels
N Grayson
A Maher
S Davies
A Evans
J Rea
K Angus

Independent Examiner

M Ellis
TJC Bookkeeping Solutions
68 Grange Road
Rhyl
Denbighshire
LL18 4BY

THE OSBORNE TRUST
Charity Number: 1160073

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 30 JUNE 2024

	Restricted Funds £	Unrestricted Funds £	Total Funds 2024 £	Total Funds 2023 £
A1: INCOMING RESOURCES				
Fundraising		54,241	54,241	26,835
Donations		29,350	29,350	47,463
Sales		1,269	1,269	1,669
Restricted Grants Received	11,080		11,080	27,324
Unrestricted Grants Received		0	0	0
A2: ASSET AND INVESTMENT SALES				
Total incoming resources	11,080	84,860	95,940	103,291
A3: RESOURCES EXPENDED				
Fundraising Costs		10,244	10,244	3,995
Supplies (Ozzy)/Supporting Costs	768	2,871	3,639	3,723
Marketing		1,695	1,695	2,181
Website		270	270	2,674
Journals/Books	2,233	4,085	6,318	4,807
Family Activities	2,327	14,499	16,826	13,598
Lockdown Activities/At Home/Shielding		709	709	879
Together Time	1,183	0	1,183	1,127
Trust Goes Outdoors		0	0	102
Subscription		562	562	209
Office Costs		3,377	3,377	1,923
Insurance		503	503	419
Accountancy		1,362	1,362	1,935
Postage	1,500	2,015	3,515	3,655
Staff Costs	9,167	46,161	55,328	43,517
Training				0
Trustee Expenses		452	452	75
Cost of sales		1,275	1,275	1,548
Legal and Professional				0
Bank Charges		70	70	93
Total Resources Expended	17,178	90,150	107,328	87,225
A4: ASSET AND INVESTMENT PURCHASES				
			0	0
			0	0

THE OSBORNE TRUST
Charity Number: 1160073

OPERATING PROFIT / (LOSS)	(6,098)	(5,290)	(11,388)	16,066
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Transfers between funds

Balances Brought forward 1 July 2023	12,921	100,905	113,826	97,760
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Balances Brought forward 30 June 2024	6,823	95,615	102,438	113,826
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	Restricted Funds £	Unrestricted Funds £	Total Funds 2024 £	Total Funds 2023 £
B1: CASH FUNDS				
Current Account	6,823	95,615	102,438	113,826
B2: OTHER MONETARY ASSETS		0	0	0
B3: INVESTMENT ASSETS		0	0	0
Total Current Assets	6,823	95,615	102,438	113,826

		Funds to which asset belongs	Cost	Current Value
B4: ASSETS RETAINED FOR THE CHARITIES OWN USE				
Photo Printer		Office Equipment	120	25
Ipad Pro		Office Equipment	797	209
IMac		Office Equipment	1,120	367
Office furniture		Furniture & fixtures	143	29
IPAD		Office Equipment	619	396
			2,799	1,026
B5: LIABILITIES	0		0	0
	0		0	0

Signed by one (or two) trustees on behalf of all the trustees.

Signature: 

Print Name C L Griffiths

Date of approval: 23/9/24

Signature: _____

Print Name: _____

Date of approval: _____

THE OSBORNE TRUST
Charity Number: 1160073
UNAUDITED ACCOUNTS
FOR THE YEAR ENDED 30 JUNE 2024

THE OSBORNE TRUST
Charity Number: 1160073

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number:

1160073

Correspondence Address:

PO Box 349
Rhyl
Denbighshire
LL18 4FP

Trustees/Committee

C Griffiths (Chairperson)
H Daniels
N Grayson
A Maher
S Davies
A Evans
J Rea
K Angus

Independent Examiner

M Ellis
TJC Bookkeeping Solutions
68 Grange Road
Rhyl
Denbighshire
LL18 4BY

THE OSBORNE TRUST
Charity Number: 1160073

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 30 JUNE 2024

	Restricted Funds £	Unrestricted Funds £	Total Funds 2024 £	Total Funds 2023 £
A1: INCOMING RESOURCES				
Fundraising		54,241	54,241	26,835
Donations		29,350	29,350	47,463
Sales		1,269	1,269	1,669
Restricted Grants Received	11,080		11,080	27,324
Unrestricted Grants Received		0	0	0
A2: ASSET AND INVESTMENT SALES				
Total incoming resources	<u>11,080</u>	<u>84,860</u>	<u>95,940</u>	<u>103,291</u>
A3: RESOURCES EXPENDED				
Fundraising Costs		10,244	10,244	3,995
Supplies (Ozzy)/Supporting Costs	768	2,871	3,639	3,723
Marketing		1,695	1,695	2,181
Website		270	270	2,674
Journals/Books	2,233	4,085	6,318	4,807
Family Activities	2,327	14,499	16,826	13,598
Lockdown Activities/At Home/Shielding		709	709	879
Together Time	1,183	0	1,183	1,127
Trust Goes Outdoors		0	0	102
Subscription		562	562	209
Office Costs		3,377	3,377	1,923
Insurance		503	503	419
Accountancy		1,362	1,362	1,935
Postage	1,500	2,015	3,515	3,655
Staff Costs	9,167	46,161	55,328	43,517
Training				0
Trustee Expenses		452	452	75
Cost of sales		1,275	1,275	1,548
Legal and Professional				0
Bank Charges		70	70	93
Total Resources Expended	<u>17,178</u>	<u>90,150</u>	<u>107,328</u>	<u>87,225</u>
A4: ASSET AND INVESTMENT PURCHASES				
			0	0
			<u>0</u>	<u>0</u>

THE OSBORNE TRUST
Charity Number: 1160073

OPERATING PROFIT / (LOSS)	(6,098)	(5,290)	(11,388)	16,066
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Transfers between funds

Balances Brought forward 1 July 2023	12,921	100,905	113,826	97,760
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Balances Brought forward 30 June 2024	6,823	95,615	102,438	113,826
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	Restricted Funds £	Unrestricted Funds £	Total Funds 2024 £	Total Funds 2023 £
B1: CASH FUNDS				
Current Account	6,823	95,615	102,438	113,826
B2: OTHER MONETARY ASSETS		0	0	0
B3: INVESTMENT ASSETS		0	0	0
Total Current Assets	6,823	95,615	102,438	113,826

		Funds to which asset belongs	Cost	Current Value
B4: ASSETS RETAINED FOR THE CHARITIES OWN USE				
Photo Printer		Office Equipment	120	25
Ipad Pro		Office Equipment	797	209
IMac		Office Equipment	1,120	367
Office furniture		Furniture & fixtures	143	29
IPAD		Office Equipment	619	396
			2,799	1,026
B5: LIABILITIES				
	0		0	0
	0		0	0

Signed by one (or two) trustees on behalf of all the trustees.

Signature: 

Print Name: C L Griffiths

Date of approval: 23/9/24

Signature: _____

Print Name: _____

Date of approval: _____

THE OSBORNE TRUST

England & Wales - Charity number 1160073

Accounts

ANNUAL REPORT 2022-2023

CHARITY NUMBER IN ENGLAND & WALES 1160073



**SUPPORTING CHILDREN DURING A PARENT'S CANCER & BEYOND
ACROSS THE UK**

JULY 2022-JUNE 2023



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1- Executive Summary

The Osborne Trust (the 'Charity') is a registered charity in England and Wales (1160073). Founded in July 2014 from Rhuddlan in North Wales and operates throughout the UK & Northern Ireland, with majority of its work taking place in England and Wales. The Osborne Trust now has its headquarters in Rhyl in North Wales.

1.1 Rationale

The charity was set up in response to a lack of support for children during a parent's cancer. The founder has personal experience of being diagnosed with cancer with 2 young children. Her encounter of finding no support for her own children generated her desire to provide other children whose Mum/Dad have cancer with the support she found lacking for her 2.

The Osborne Trust mission statement has now changed since our inception and now encompasses support for children who have seen a parent die from cancer.

Supporting children during a parent's cancer & beyond

And priority goes to supporting families where: -

- a) Children (by children we mean those who are 18 years and younger) living with a parent who has a cancer diagnosis, is having cancer treatment, seen a cancer recurrence, living with incurable cancer and if applicable seen a parent die from this disease.

The Osborne Trust vision is:

Every child who sees a parent go through cancer can access emotional and practical support from the Trust.

1.2 Structure

The Osborne Trust currently has one full time staff member and a strong board of trustees/management committee drawn from various sectors with a wide range of skills and expertise, in addition to a personal experience of cancer. The current staff team consists of a CEO/Charity Manager.

All trustees provide their time in a voluntary capacity.

1.3 July 2022-June 2023

The Osborne Trust is now in its 8^h year and is still the only charity focusing solely on supporting children during a parent's cancer across the whole of the UK & NI. Our core support programme of funding local respite activities and packages we provide are funded entirely by donations, fundraising and some grant funding. All our support services are provided free of charge to families.

The funds raised by The Osborne Trust is generated by charity led fundraising activities, sales of branded merchandise, as well as our Ozzy & friends teddies and accessories. Alongside this, fundraising and donations from individuals, community groups and businesses as well as sourcing grants and funding wherever possible.

Funds have been used effectively to support our core areas of support. These are reducing isolation for children through a local respite activity, providing comfort through our Ozzy the Elephant teddy and equipping children and young people with mindfulness tools such as journals, books, flashcards and colouring to assist their emotional well-being.

Our profile about what we do and who we support has increased significantly amongst both the medical/cancer sector and the public. This is evident in the number of children we have supported this year, 710 children this year from 444 the previous year, an increase of 59%.

We have seen an increase in referrals from new areas/counties. We find once a Macmillan Information Officer, Breast Care Nurse, Cancer Support worker and other staff at cancer centers and hospitals find out about us, referrals increase dramatically for a county/area. We have strengthened our close working relationships with others in the areas where we see a high rate of referrals coming in, such as the radiotherapy department at North Wales Cancer Centre. There are some areas that need revisiting in our next year. Referrals have decreased in Merseyside and the contact we have there has left her role, we are working to find it who her replacement is. We will be focusing on getting out information back out to Scotland as referrals there has decreased dramatically this year compared to previous years.

The families we have supported are also important ambassadors for us to help promote to the work we do.

1.4 2021-2026

As The Osborne Trust moves into its 9th year and beyond, much of our work will be around increasing the number of children and young people we support and tailoring this support to their needs from their feedback. Our work continues to be led by the children and young people we support. Our strategic aims over the next 5 years are as follows:

- To continue to support children and young people through our core support programmes.
- To offer high school aged children access to peer to peer support through activity-based group exercise and activities.
- To ensure cancer patients who are parents to under 18-year-olds receive consistent and accurate advice regarding support on offer for their children.
- To ensure families are signposted to FREE support programmes and packages to assist their children during their cancer and not signposted to those where they must pay for any support for their children.
- To increase the number of staff to meet the increasing demand and geographical spread of our work.
- To create and manage a volunteer structure and corresponding policy.
- To develop a support programme for those children who experience a parent living with incurable/terminal cancer and/or die from cancer.

Specific goals for the next 5 years are set out in section 5

Emma Osborne Founder/CEO/Charity Coordinator

2- Organisational Details

2.1 Charity Name

The Osborne Trust

2.2 Registered Address

Po Box 349, Rhyl, Denbighshire, LL18 9HX, Wales

2.3 Correspondence Address

Po Box 349, Rhyl, Denbighshire, LL18 9HX, Wales

2.4 Telephone Number

07712 089273

2.5 Email

the-osborne-trust@outlook.com

2.6 Website

www.theosbornetrust.com

2.7 Legal Status

Registered Charity in England and Wales No: 1160073

HMRC Charities Ref: EW29751

Member of the Fundraising Regulator

2.8 Objects

The Trusts objects, as listed on the Charity Commission are specifically related to the following:

The relief of sickness and need, and the preservation of health for children affected by their parent's cancer:

- a) To provide children and young people aged 16 years and under whose parents have cancer some time out activities during their parent's cancer treatment by funding these activities.
- b) For the provision of activities that will bring comfort to children under 16 years of age whilst their parents have cancer, which will in turn have a beneficial effect on the well-being of the family during this time.
- c) To fund the provision of leisure services/activities for children and young people where the parent has cancer, such as plays centre activities, cinema tickets bowling passes etc. to relieve the stress placed upon families during cancer treatment by paying for these to take place.

3- The Osborne Trust

3.1 Vision

To support every child & young person living with a parent undergoing cancer treatment & beyond.

3.2 Mission Statement

Supporting children during a parent's cancer treatment & beyond.

To achieve this as a charity we aim to reduce children and young people's isolation, provide mindfulness tools to feel better able to cope and provide emotional support through our core support programmes and packages.

3.3 Values

The work of The Osborne Trust reflects the key principles and values of the Charity, upheld by its Board of Trustees- confidentiality, transparency, equal opportunities for all and the unique circumstances of each person/family supported.

3.4 What we do

Charitable activities are provided through 5 main priorities:

1. Offering each child referred into our service a support pack made up of items they identify they need such as our Ozzy teddy for comfort, journaling for mindfulness, flashcards for younger children and colouring.
2. Funding local respite activities to reduce children's feelings of isolation. Unexpected costs arise after a cancer diagnosis, there is a massive financial impact for most families. We will fund for children and young people to get some 'time away' from seeing Mum/Dad at their worst through treatment and go off to 'enjoy' a trip to a farm park, watch a movie, go bowling, jump around at a trampoline park or even some food at the local pizza place.
3. Bringing families together on our Together Time activities to reduce children's isolation. They may be the only child at school whose parent has cancer, but by bringing families together, we are showing them they are not the only ones.
4. Supporting children's emotional well-being as they see their parent go through cancer, through mindfulness tools & respite activities.
5. Providing a one stop shop for advice and information about a cancer diagnosis for a parent with children on how best to support their child/ren, including

links to localised services and signposting to other organisations who can offer help.

4- Background and Achievements to Date

4.1- Background

The Osborne Trust was founded after our founder/CEO was diagnosed with cancer age 36 years with children aged 7 & 4 and finding no support on offer for them.

Emma was diagnosed in 2013 and spent 10 months going through cancer treatment, operation, chemotherapy, and radiotherapy, with many hospital stays due to infections and complications. Throughout this time Emma's thoughts were always on how best to support her children. She asked at every appointment was there anything locally or nationally that could support the kids and was met with a brick wall, she found lots of services for herself but nothing specifically focusing on supporting her children through this time.

The family got through it by planning activities around Emma's treatment. Dad would take the kids off to the cinema, a play centre, a farm park so Emma could have some time to rest, and the kids got out of the house from seeing Emma so poorly from her grueling treatment.

At the same time as Emma's treatment, an old family friend was diagnosed with cancer with 3 teenage children and was self-employed with very little income coming in. This got Emma thinking about the financial implications a cancer diagnosis has for a family and how getting a day out or going to the cinema could be a luxury that stopped when a parent had cancer due to money worries. From there the first ideas for the Trust was born.

Emma finished her treatment in the February of 2014 and once through this she got to work on looking into setting up a charity to support children during a parent's cancer. She asked her own children what they would have found beneficial, one idea was a teddy to cuddle and provide comfort for when Emma was in hospital and Ozzy the Elephant was born.

4.2: The Osborne's Trusts Volunteers and Supporters

The Trust has established a dedicated team of volunteers through our Trustees, Fundraising/Events volunteers, professional advisors, and ambassadors, without whom our charitable activities could not be carried out. These individuals give up their free time to help us continue our work here at the charity.

4.3- Partner Organisations

Strong working relationships have been developed with both hospitals, cancer centres and cancer related charities across the UK namely:

- North Wales Cancer Centre
- The Christie Hospital
- Macmillan Cancer Support Hubs/Officers across the whole of the UK & NI
- Team Verrico
- Mummy's Star
- Breast Care teams across certain parts of the UK
- Specialist Cancer teams/nurses across certain parts of the UK
- NHS Hospitals in (certain parts of the UK)
- NHS GP Surgeries (in certain parts of the UK)

We have received many referrals from the above organisations. Macmillan teams across the UK & NI remain our biggest referrer.

4.4 Profile

Growth in our profile and charity awareness has been positive thanks to our social media pages and engagement on these. We have received a major boost to our profile over the past year thanks to working with the partnership organisations listed above and being a local Housing Association charity of the year from April '22, Clwyd Alyn.

We help any parent we have supported to raise awareness about the Trust and our work in supporting children. By sharing their story across social media channels and the general media they spread the news of who we are and what we do.

5- Our Goals

5.1- 2014-2021

Such has been the growth of the Trust since we first started, we have needed to reflect upon what has been achieved so we can plan accordingly. It is evident that our core support of the local respite activities and our support packs are working well and require little development bar any new products that come on the market which may be beneficial. We have introduced a Worry Bear for children's pockets to fill the gap between anxious thoughts whilst away from the parent undergoing treatment,

Our together time, where we bring families together so children and young people can see they aren't the only ones needs more development as the covid situation has lessened and we can now bring families together again.

Our peer-to-peer support work started in the tail of 2022 and beginning of 2023. Over 30 teens accessed our outdoor activity programme, which included skiing, watersports day, tree top trekking, river assault course, surfing lesson and inflatable fun. This was made possible thanks to funding from the Burbo Bank Extension Community Fund and National Lottery Community Fund in both England and Wales.

Promotion of what we do needs to increase to enable us to reach many more families than we do presently. We have looked at our map of areas to identify where we have failed to reach over this past year and will do a mail shot to these cancer centres and hospitals, as well as ask our networks via social media if they can deliver leaflets to the hospitals for us.

5.2- Next 12 months

- To continue to provide our support packages to children of all ages.
- To fund up to 3 respite local activities for children during a parent cancer.
- Develop a specific programme to support children whose parent is living with an incurable/terminal cancer and/or died from the disease through our beyond support.
- To increase the partner organisations we work closely with so we can reach many more families.
- Look to secure a large grant for running costs for several years from a national funding programme.
- Look to employ an additional member of staff and source relevant grant funding to be able to do so.
- Continue to diversify our income to ensure our long-term sustainability
- Create a volunteer structure which details the opportunities we offer and the benefits of volunteering with us.
- Maintain existing relationship and build new ones with other charities and cancer organisations, especially hospitals in certain regions where our support is not as high.

5.3- 5-year forecast

- Be the go-to service that health/cancer practitioners refer the children of their patients to.

- Reach over 50% of parents who have been diagnosed with cancer and have children living with them.
- Raise 250k in income by 2027.
- Employ coordinators in at least 2 counties in England (paid or voluntary capacity).
- Hold at least 6 months operational costs in case of any risk or having to wind the charity down.

6- Benefit/Need

6.1- What is the benefit/need to the public

Reducing isolation and supporting the emotional wellbeing of the children of a parent with cancer

6.2- Who will benefit

The Trust focuses on supporting children and young where: -

- Mum or Dad is newly diagnosed with cancer
- Mum or Dad is undergoing cancer treatment
- Mum or Dad has a secondary/terminal cancer diagnosis, we will support throughout
- Mum or Dad loses their life from cancer whilst we have supported them in the past will continue supporting them.

6.3- How will they benefit

The Trust seeks to reduce children and young people's isolation and support their emotional and mental wellbeing when Mum or Dad is going through cancer by: -

- Funding up to the 3 local respite activities to reduce their isolation
- Bring children and young people together with others to reduce their isolation
- Relieve some of the financial burdens incurred because of the cancer diagnosis
- Advise and support children and young to look after their mental and emotional wellbeing through our support packages
- Advise, support, and share knowledge to support a parent with children going through cancer.
- Offer peer to peer mentoring support through outdoor based activities.

6.4 What similar services/organisations are currently available?

We haven't been able to find any other cancer charity that works across the UK and Northern Ireland that the onus is on the kids (and not the cancer patient) and whose sole focus is on supporting children and young people during a parent's cancer.

Cancer is being diagnosed more in the under 50's age groups, where a high number will be parents, whilst lots of other organisations have a leaflet or a section on their website for these patients, other charities are not able to address or provide specific help or solutions like us, which are: -

- The alleviation of isolation for children and young people seeing a parent go through cancer
- Funding respite activities and support packs for these families to ease short term hardship.

Some organisations and charities offer children and young people's open days, but we found this to be a few times a year with the focus still being on the cancer patient as opposed to their children.

6.5- How we work with other providers

Referral systems are in place for other organisations to refer cancer patients who are parents to anyone under 18 to us, which in turn will help those charities to provide next step support via the services we offer.

Please refer to section 4.3 on who we are already working with.

7- Performance Monitoring

7.1- Key Performance Indicators (KPI's)

- Number of support packs posted out to children and young people who meet our specific criteria.
- Number of local respite activities funded.
- Sufficient funds to meet support packs and activities raised.
- Number of children and young people receiving our advice and support.
- Amount of significant publicity pieces, articles, and adverts

- Number of different healthcare providers/organisations and charities referring families to us.
- Number of new charities and organisations worked with.

7.2- Measurement of KPI's

- Support packs sent out are documented with the evidence and agreed criteria adhered to.
- Number of local respite activities documented (including cost), evidence and agreed criteria adhere to
- Funds are available and accessible to CEO/Coordinator and treasurer.
- Documentation is available and clear/can be explained. Suitable for children and young people to receive and understand.
- Requests are responded to within 10 days. Continuity of responder ideally where possible
- More referrals from new healthcare providers/organisations. More likes/follows on Facebook, Twitter & Instagram.
- More requests for support received.
- Named contact on behalf of The Osborne Trust and the children & young people we support.

7.3- Reporting of KPI's

- Documentation and CEO/Coordinator reporting to chair and trustees.
- Report back to quarterly meetings
- CEO/Treasurer's report to Trustees and CEO updating on fundraising activities
- CEO reports to Chair
- Evidence trail on social media channels/emails. CEO/ relevant trustees to report at meetings.
- CEO to provide update at meetings when appropriate.

8- Promotion/Marketing

8.1- How and where we promote our work

See Communications Plan

8.2- Current activity

A lot of our promotion and advertising is done across our social media channels

(Facebook, Instagram & Twitter) Facebook has been our most successful, with over 4,000 followers and generated a lot of revenue through their fundraising avenues on the page. Twitter has been beneficial in creating links with NHS Trusts, practitioners, and other cancer services. Doing more on Linked in will be a focus going forward, it's not something we have maximized at present. Additionally for 23/24 we need to look at having a presence on Tik Tok.

8.3 Website

Over the past year we have carried out a complete overhaul of our website so it's easy for the patient to access support for their kids and for the health practitioners to refer the families they are supporting over. Our new website was launched in June 2022. Additionally, we want to maximize what we have been up to and what we have and are doing in terms of support and fundraising through the site.

9- The Organisation

9.1- Board of Trustees

The following trustees were active during the year ending June 30th 2023

<u>Name</u>	<u>Position</u>	<u>Appointed</u>	<u>Resigned</u>
<u>Clare Griffiths</u>	<u>Chair Trustee</u>	<u>7th Dec 20 14</u>	<u>N/A</u>
<u>Anwen Maher</u>	<u>Trustee</u>	<u>21st Nov 2 019</u>	<u>N/A</u>
<u>Helen Daniels</u>	<u>Trustee</u>	<u>14th May 2021</u>	<u>N/A</u>
<u>Nicky Grayston</u>	<u>Trustee</u>	<u>20th Feb 2 018</u>	<u>N/A</u>
<u>Jayne Rea</u>	<u>Trustee</u>	<u>1st July 20 01</u>	<u>N/A</u>
<u>Sioned Davies</u>	<u>Trustee</u>	<u>21st Nov 2 019</u>	<u>N/A</u>
<u>Angela Evans</u>	<u>Treasurer/Trustee</u>	<u>20th Feb 2 018</u>	<u>N/A</u>
<u>Kelly Angus</u>	<u>Trustee</u>	<u>1st Oct 2021</u>	<u>N/A</u>

9.2- Staff

Emma Osborne Founder/CEO/Charity Coordinator

9.3- Volunteers

Due to the nature of The Trust, how we work and the fact we operate all over the UK virtually/remotely, our volunteer offer differs to other organisations.

Volunteering can often be through our fundraising events within the community as well as admin support and visiting hospitals all over the UK with our posters and leaflets.

9.4- Premises

The Trust currently has no accommodation assets.

9.5- New equipment and consumables

New equipment and consumables to enable the Trust to carry out its work will be purchased as necessary but will always seek to attain value for money.

Consumables to enable the Trust to carry out its work will be purchased as necessary but will always seek to attain value for money.

9.6- Policies and Procedures

The Trust has active policies covering the following: -

- Safeguarding
- Financial Management
- Reserves Policy
- Volunteer
- Risk Management
- GDPR & Data Protection
- Privacy Policy
- Equality and Diversity
- Welsh Language
- Trustee Expenses
- Trustees Code of Conduct

9.7- Risk

Please see Risk Management Policy

9.8- Trustees Recruitment/Appointment

Where vacancies arise on the board of trustees, a public advert will be made outlining the role, time and skills required and the nature of what being a trustee means in full, in line with guidance by the Charities Commission.

Officers' roles of the board are elected at the AGM.

10- Fundraising Strategy

10.1 General Funds

The Trust will seek to increase fundraising levels on 2022-2023 and will seek to develop fundraising strategy to provide greater structure and long-term security. Grants and funding will be applied for as in previous years.

10.2 Trading

The Trust trades on pre purchased, branded goods namely hoodies, pens, wristbands, mugs, coasters, tote bags and cards. Additionally, Ozzy the Elephant teddies (sent for free to children we support) which can be purchased alongside other animal teddies to plough back monies into the trust. These items are traded via our website www.theosbornetrust.com, eBay and on social media pages. Some branded merchandise is given to fundraising events and fundraisers for free to help raise awareness and funds for The Osborne Trust.

11- Trustees Report

Registered number: 1160073

Trustees' responsibilities in relation to the financial statements

The trustees are responsible for preparing a trustees' annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice). The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

The Charity Commission requires the trustees to prepare financial statements for each financial year. Under that law the trustees have elected to prepare the financial statements in accordance with United Kingdom Generally Accepted Accounting Practice (Financial Reporting Standard 102 and applicable law). The trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the situation of the charity and of the incoming resources and application of resources, including the income and expenditure, of the Charity for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently.
- make judgements and estimates that are reasonable and prudent.
- observe the methods and principles in the Charities SORP;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements.
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the company will continue in business.

The trustees are responsible for keeping adequate accounting records that are sufficient to show and explain the charities transactions and disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charity Commissions requirements. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Disclosure of information to independent examiners

Each person who was a Trustee at the time this report was approved confirms that:

- so far as she is aware, there is no relevant information of which the Charity's independent examiner is unaware; and
- she has taken all the steps that she ought to have taken as a Trustee to make herself aware of any relevant information and to establish that the Charity's independent examiner is aware of that information.

This report was approved by the board on 1/8/2022 and signed on its behalf. Clare

Griffiths Chair of Board of Trustees

12- Charity Information

Trustees

<u>Name</u>	<u>Position</u>	<u>Appointed</u>	<u>Resigned</u>
<u>Clare Griffiths</u>	<u>Chair Trustee</u>	<u>7th Dec 20 14</u>	<u>N/A</u>
<u>Anwen Maher</u>	<u>Trustee</u>	<u>21st Nov 2 019</u>	<u>N/A</u>
<u>Helen Daniels</u>	<u>Trustee</u>	<u>14th May 2021</u>	<u>N/A</u>
<u>Nicky Grayston</u>	<u>Trustee</u>	<u>20th Feb 2 018</u>	<u>N/A</u>
<u>Jayne Rea</u>	<u>Trustee</u>	<u>1st July 20 01</u>	<u>N/A</u>

<u>Sioned Davies</u>	<u>Trustee</u>	<u>21st Nov 2 019</u>	<u>N/A</u>
<u>Angela Evans</u>	<u>Treasurer/Trustee</u>	<u>20th Feb 2 018</u>	<u>N/A</u>
<u>Kelly Angus</u>	<u>Trustee</u>	<u>1st Oct 2021</u>	<u>N/A</u>

Independent Examiner

Michelle Ellis
TJC Accounting
Maes Y Gog
Rhyl
Denbighshire
LL18 4QA

Registered Offices

PO Box 349
Rhyl
Denbighshire
LL18 9HX

Registered Charity Number

1160073

13- Independents Examiners Report

Please see Unaudited Accounts Report

14- Financial Statement

Please see Unaudited Accounts Report

Balance Sheet

Please see Unaudited Accounts Report

Approved Clare Griffiths

Signature C L GRIFFITHS

Date 30/09/2023

THE OSBORNE TRUST
Charity Number: 1160073
UNAUDITED ACCOUNTS
FOR THE YEAR ENDED 30 JUNE 2023

THE OSBORNE TRUST
Charity Number: 1160073

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number:
1160073

Correspondence Address:
PO Box 349
Rhyl
Denbighshire
LL18 4FP

Trustees/Committee

C Griffiths (Chairperson)
H Daniels
N Grayson
A Maher
S Davies
A Evans
J Rea
K Angus

Independent Examiner

M Ellis
TJC Bookkeeping Solutions
3 Maes Y Gog
Rhyl
Denbighshire
LL18 4QA

THE OSBORNE TRUST
Charity Number: 1160073

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 30 JUNE 2023

	Restricted Funds £	Unrestricted Funds £	Total Funds 2023 £	Total Funds 2022 £
A1: INCOMING RESOURCES				
Fundraising		26,835	26,835	35,868
Donations		47,463	47,463	18,670
Sales		1,669	1,669	2,058
Restricted Grants Received	27,324		27,324	15,686
Unrestricted Grants Received		0	0	0
A2: ASSET AND INVESTMENT SALES				
Total incoming resources	<u>27,324</u>	<u>75,967</u>	<u>103,291</u>	<u>72,282</u>
A3: RESOURCES EXPENDED				
Fundraising Costs		3,995	3,995	5,133
Supplies (Ozzy)/Supporting Costs	3,177	546	3,723	2,952
Marketing		2,181	2,181	2,720
Website		2,674	2,674	3,638
Journals/Books	732	4,075	4,807	4,179
Family Activities	989	12,609	13,598	8,681
Lockdown Activities		879	879	1,037
Together Time	353	774	1,127	1,436
Trust Goes Outdoors		102	102	3,559
Subscription		209	209	579
Office Costs	764	1,923	1,923	1,398
Insurance		419	419	364
Accountancy		1,936	1,936	895
Postage	826	2,829	3,655	4,490
Staff Costs	16,400	27,117	43,517	40,338
Training				90
Trustee Expenses		75	75	21
Cost of sales		1,548	1,548	3,149
Legal and Professional				182
Bank Charges		93	93	74
Total Resources Expended	<u>23,241</u>	<u>63,984</u>	<u>87,225</u>	<u>84,915</u>
A4: ASSET AND INVESTMENT PURCHASES				
			0	0
			<u>0</u>	<u>0</u>

THE OSBORNE TRUST
Charity Number: 1160073

OPERATING PROFIT / (LOSS)	4,083	11,983	16,066	(12,633)
Transfers between funds				
Balances Brought forward 1 July 2022	8,838	88,922	97,760	110,393
Balances Brought forward 30 June 2023	12,921	100,905	113,826	97,760

	Restricted Funds £	Unrestricted Funds £	Total Funds 2022 £	Total Funds 2023 £
B1: CASH FUNDS				
Current Account	12,921	100,905	113,826	97,760
B2: OTHER MONETARY ASSETS		0	0	0
B3: INVESTMENT ASSETS		0	0	0
Total Current Assets	12,921	100,905	113,826	97,760

		Funds to which asset belongs	Cost	Current Value
B4: ASSETS RETAINED FOR THE CHARITIES OWN USE				
Photo Printer		Office Equipment	120	31
Ipad Pro		Office Equipment	797	262
IMac		Office Equipment	1,120	458
Office furniture		Furniture & fixtures	143	69
IPAD		Office Equipment	619	495
			2,799	1,315
B5: LIABILITIES	0	0	0	0
	0	0	0	0

Signed by one (or two) trustees on behalf of all the trustees.

Signature: _____

Signature: _____

Print Name _____

Print Name: _____

Date of approval: _____

Date of approval: _____

THE OSBORNE TRUST
Charity Number: 1160073

**INDEPENDENT EXAMINER'S REPORT
FOR THE YEAR ENDED 30 JUNE 2023**

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE OSBORNE TRUST.

I report on the financial statements of the charity for the year ended 30 June 2023 which are set out on pages 3 to 4.

RESPECTIVE RESPONSIBILITIES OF THE TRUSTEES AND EXAMINER

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act"). I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 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.

BASIS OF THE INDEPENDENT EXAMINER'S REPORT

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

INDEPENDENT EXAMINER'S STATEMENT

I have completed my examination and I confirm that no material matters have come to my attention

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



.....
Michelle Ellis
3 Maes Y Gog
Rhyl
Denbighshire
LL18 4QA
Date: 1st November 2023

THE OSBORNE TRUST
Charity Number: 1160073
UNAUDITED ACCOUNTS
FOR THE YEAR ENDED 30 JUNE 2023

THE OSBORNE TRUST
Charity Number: 1160073

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Independent Examiner

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Charity Number: 1160073

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B5: LIABILITIES		<u>0</u>	<u>0</u>
		<u>0</u>	<u>0</u>

Signed by one (or two) trustees on behalf of all the trustees.

Signature: _____

Signature: _____

Print Name _____

Print Name: _____

Date of approval: _____

Date of approval: _____

THE OSBORNE TRUST
Charity Number: 1160073

**INDEPENDENT EXAMINER'S REPORT
FOR THE YEAR ENDED 30 JUNE 2023**

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE OSBORNE TRUST.

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2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



.....
Michelle Ellis
3 Maes Y Gog
Rhyl
Denbighshire
LL18 4QA
Date: 1st November 2023

THE OSBORNE TRUST

England & Wales - Charity number 1160073

Accounts

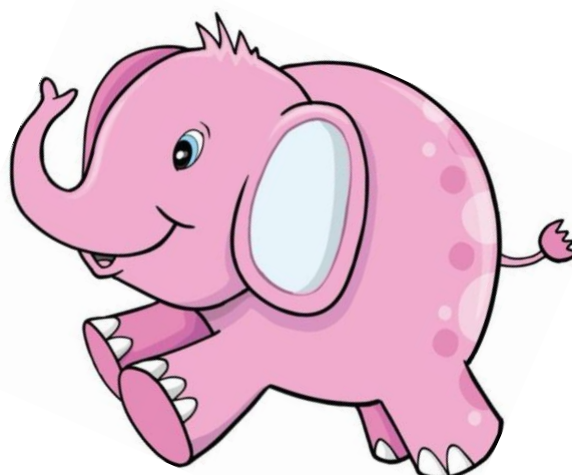
ANNUAL REPORT 2021-2022

CHARITY NUMBER IN ENGLAND & WALES 1160073



**SUPPORTING CHILDREN DURING A PARENT'S CANCER & BEYOND
ACROSS THE UK**

JULY 2021-JUNE 2022



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 - 1.2 Structure
 - 1.3 2020-2021
 - 1.4 2021-2026

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 - 2.2 Registered Address
 - 2.3 Correspondence Address
 - 2.4 Telephone Number
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1- Executive Summary

The Osborne Trust (the 'Charity') is a registered charity in England and Wales (1160073). Founded in July 2014 from Rhuddlan in North Wales and operates throughout the UK & Northern Ireland, with majority of its work taking place in England and Wales. The Osborne Trust now has its headquarters in Rhyl in North Wales.

1.1 Rationale

The charity was set up in response to a supposed lack of support for children during a parent's cancer. The founder has personal experience of being diagnosed with cancer with 2 young children. Her encounter of finding no support for her own children generated her desire to provide other children whose Mum/Dad have cancer with the support she found lacking for her 2 children.

The Osborne Trust mission statement has now changed for 2022 and is as below:

Supporting children during a parent's cancer & beyond

And support families were

- a) A parent receives a cancer diagnosis and have children under the age of 18 living at home with them

The Osborne Trust vision is:

Every child who sees a parent go through cancer can access emotional and practical support from the Trust.

1.2 Structure

The Osborne Trust currently has one full time staff member and a strong board of trustees/management committee drawn from various sectors with a wide range of skills and expertise, in addition to a personal experience of cancer. The current staff team consists of a CEO/Charity Manager.

All trustees provide their time in a voluntary capacity.

1.3 July 2021-June 2022

The Osborne Trust is now in its 7th year and is still the only charity focusing solely on supporting children during a parent's cancer across the whole of the UK. Our core support programmes and packages we provide is funded entirely by donations fundraising and some grant funding. All our support services are provided free of charge to families.

The funds raised by The Osborne Trust is generated by charity led fundraising activities, sales of branded merchandise, as well as our Ozzy & friends teddies and accessories. Alongside this, fundraising and donations from individuals, community groups and businesses as well as sourcing grants and funding wherever possible.

Funds have been used effectively to support our core areas of support. These are reducing isolation for children through a local respite activity, providing comfort through our Ozzy the Elephant teddy and equipping children and young people with mindfulness tools such as a journal, books and colouring to assist their emotional well-being.

Our profile about what we do and who we support has increased significantly amongst both the medical/cancer sector and the public. Primarily this has been done through contacting every Macmillan Information and Support Hubs across the UK as well as strengthening our existing relationships with charities and practitioners. The families we have supported are also important ambassadors for us to help promote to the work we do.

1.4 2021-2026

As The Osborne Trust moves into its 8th year and beyond, much of our work will be around increasing the number of children and young people we support and tailoring this support to their needs from their feedback. Our work continues to be led by the children and young people we support. Our strategic aims over the next 5 years are as follows:

- To continue to support children and young people through our core support programmes.
- To offer high school aged children access to peer to peer support through activity-based group exercise and activities.
- To ensure cancer patients who are parents to under 18-year-olds receive consistent and accurate advice regarding support on offer for their children.
- To ensure families are signposted to FREE support programmes and packages to assist their children during their cancer and not signposted to those where they must pay for any support for their children.
- To increase the number of staff to meet the increasing demand and geographical spread of our work.
- To create and manage a volunteer structure and corresponding policy.
- To develop a support programme for those children who experience a parent living with incurable/terminal cancer and/or die from cancer.

Specific goals for the next 5 years are set out in section 5

Emma Osborne
Founder/CEO/Charity Coordinator

2- Organisational Details

2.1 Charity Name

The Osborne Trust

2.2 Registered Address

Po Box 349, Rhyl, Denbighshire, LL18 9HX, Wales

2.3 Correspondence Address

Po Box 349, Rhyl, Denbighshire, LL18 9HX, Wales

2.4 Telephone Number

07712 089273

2.5 Email

the-osborne-trust@outlook.com

2.6 Website

www.theosbornetrust.com

2.7 Legal Status

Registered Charity in England and Wales No: 1160073

HMRC Charities Ref: EW29751

Member of the Fundraising Regulator

2.8 Objects

The Trusts objects, as listed on the Charity Commission are specifically related to the following:

The relief of sickness and need, and the preservation of health for children affected by their parent's cancer:

- a) To provide children and young people aged 16 years and under whose parents have cancer some time out activities during their parent's cancer treatment by funding these activities.
- b) For the provision of activities that will bring comfort to children under 16 years of age whilst their parents have cancer, which will in turn have a beneficial effect on the well-being of the family during this time.
- c) To fund the provision of leisure services/activities for children and young people where the parent has cancer, such as plays centre activities, cinema tickets bowling passes etc to relieve the stress placed upon families during cancer treatment by paying for these to take place.

3- The Osborne Trust

3.1 Vision

To support every child & young person living with a parent undergoing cancer treatment & beyond.

3.2 Mission Statement

Supporting children during a parent's cancer treatment & beyond.

To achieve this as a charity we aim to reduce children and young people's isolation, provide mindfulness tools to feel better able to cope and provide emotional support through our core support programmes and packages.

3.3 Values

The work of The Osborne Trust reflects the key principles and values of the Charity, upheld by its Board of Trustees- confidentiality, transparency, equal opportunities for all and the unique circumstances of each person/family supported.

3.4 What we do

Charitable activities are provided through 5 main priorities:

1. Offering each child referred into our service a support pack made up of items they identify they need such as our Ozzy teddy for comfort, journaling for mindfulness, flashcards for younger children and colouring.
2. Funding local respite activities to reduce children's feelings of isolation. Unexpected costs arise after a cancer diagnosis, there is a massive financial impact for most families. We will fund for children and young people to get some 'time away' from seeing Mum/Dad at their worst through treatment and go off to 'enjoy' a trip to a farm park, watch a movie, go bowling, jump around at a trampoline park or even some food at the local pizza place.

3. Bringing families together on our Together Time activities to reduce children's isolation. They may be the only child at school whose parent has cancer, but by bringing families together, we are showing them they are not the only ones.
4. Supporting children's emotional well-being as they see their parent go through cancer, through mindfulness tools & respite activities.
5. Providing a one stop shop for advice and information about a cancer diagnosis for a parent with children on how best to support their child/ren, including links to localised services and signposting to other organisations who can offer help.

4- Background and Achievements to Date

4.1- Background

The Osborne Trust was founded after our founder/CEO was diagnosed with cancer age 36 years with children aged 7 & 4 and finding no support on offer for them.

Emma was diagnosed in 2013 and spent 10 months going through cancer treatment, operation, chemotherapy, and radiotherapy, with many hospital stays due to infections and complications. Throughout this time Emma's thoughts were always on how best to support her children. She asked at every appointment was there anything locally or nationally that could support the kids and was met with a brick wall, she found lots of services for herself but nothing specifically focusing on supporting her children through this time.

The family got through it by planning activities around Emma's treatment. Dad would take the kids off to the cinema, a play centre, a farm park so Emma could have some time to rest, and the kids got out of the house from seeing Emma so poorly from her gruelling treatment.

At the same time as Emma's treatment, an old family friend was diagnosed with cancer with 3 teenage children and was self-employed with very little income coming in. This got Emma thinking about the financial implications a cancer diagnosis has for a family and how getting a day out or going to the cinema could be a luxury that stopped when a parent had cancer due to money worries. From there the first ideas for the Trust was born.

Emma finished her treatment in the February of 2014 and once through this she got to work on looking into setting up a charity to support children during a parent's cancer. She asked her own children what they would have found beneficial, one idea was a teddy to cuddle and provide comfort for when Emma was in hospital and Ozzy the Elephant was born.

4.2: The Osborne's Trusts Volunteers and Supporters

The Trust has established a dedicated team of volunteers through our Trustees, Fundraising/Events volunteers, professional advisors, and ambassadors, without whom our charitable activities could not be carried out. These individuals give up their free time to help us continue our work here at the charity.

4.3- Partner Organisations

Strong working relationships have been developed with both hospitals, cancer centres and cancer related charities across the UK namely:

- North Wales Cancer Centre
- Clatterbridge Cancer Centres
- The Christie Hospital
- Macmillan Cancer Support
- Mummy's Star
- Team Verrico
- Young Lives V's Cancer (prev Clic Sgt)
- Young Breast Cancer Network (YBCN)
- NHS Hospitals in (certain parts of the UK)
- NHS GP Surgeries (in certain parts of the UK)

We have received many referrals from the above organisations and have also had the opportunity to speak to their teams to inform them of the work we do with children and young people during a parent's cancer. This has helped establish how we can better work together in the future for the most benefit of the children within a patients' family.

Over the past 12 months we have contacted every Macmillan Information and Support Hub across the UK and from this have seen an increase in referrals from areas we have struggled with previously such as mid and south Wales and the Merseyside areas.

4.4 Profile

Growth in our profile and charity awareness has been positive thanks to our social media pages and engagement on these. We have received a major boost to our profile over the past year thanks to working with the parentship organisations listed above and being a local Housing Association charity of the year from April '22, Clwyd Alyn.

We help any parent we have supported to raise awareness about the Trust and our work in supporting children. By sharing their story across social media channels and the general media they spread the news of who we are and what we do.

5- Our Goals

5.1- 2014-2021

Such has been the growth of the Trust since we first started, we have needed to reflect upon what has been achieved so we can plan accordingly. It is evident that our core support of the local respite activities and our support packs are working well and require little development bar any new products that come on the market which may be beneficial.

Our together time, where we bring families together so children and young people can see they aren't the only ones needs more development as the covid situation has lessened and we can now bring families together again.

Our peer-to-peer support work will be developed over the next 12 months for the older ages 10-18 years thanks to funding from the Burbo Bank Extension Community Fund and National Lottery Community Fund in both England and Wales.

Promotion of what we do needs to increase to enable us to reach many more families than we do presently. We have looked at our map of areas we have failed to reach over this past year and will do a mail shot to these cancer centres and hospitals, as well as ask our networks via social media if they can deliver leaflets to the hospitals for us.

5.2- Next 12 months

- To continue to provide our support packages to children of all ages.
- To fund up to 3 respite local activities for children during a parent cancer.
- Develop a specific programme to support children whose parent is living with an incurable/terminal cancer and/or died from the disease through our beyond support.
- To increase the partner organisations we work closely with so we can reach many more families.
- Evaluate our pilot peer to peer project through outdoor activities within the North Wales and Northwest regions (conditions of the funding received)
- Look to employ an additional member of staff and source relevant grant funding to be able to do so.
- Continue to diversify our income to ensure our long-term sustainability
- Create a volunteer structure which details the opportunities we offer and the benefits of volunteering with us.
- Maintain existing relationship and build new ones with other charities and cancer organisations, especially hospitals in certain regions where our support is not as high.

5.3- 5-year forecast

- Be the go-to service that health/cancer practitioners refer the children of their patients to.
- Reach over 50% of parents who have been diagnosed with cancer and have children living with them.
- Raise 250k in income by 2027.
- Employ coordinators in at least 2 counties in England (paid or voluntary capacity).
- Hold at least 6 months operational costs in case of any risk or having to wind the charity down.

6- Benefit/Need

6.1- What is the benefit/need to the public

Reducing isolation and supporting the emotional wellbeing of the children of a parent with cancer

6.2- Who will benefit

The Trust focuses on supporting children and young where: -

- Mum or Dad is newly diagnosed with cancer
- Mum or Dad is undergoing cancer treatment
- Mum or Dad has a secondary/terminal cancer diagnosis, we will support throughout
- Mum or Dad loses their life from cancer whilst we have supported them in the past will continue supporting them.

6.3- How will they benefit

The Trust seeks to reduce children and young people's isolation and support their emotional and mental wellbeing when Mum or Dad is going through cancer by: -

- Funding up to the 3 local respite activities to reduce their isolation
- Bring children and young people together with others to reduce their isolation
- Relieve some of the financial burdens incurred because of the cancer diagnosis
- Advise and support children and young to look after their mental and emotional wellbeing through our support packages
- Advise, support, and share knowledge to support a parent with children going through cancer.
- Offer peer to peer mentoring support through outdoor based activities.

6.4 What similar services/organisations are currently available?

We haven't been able to find any other cancer charity that works across the UK and Northern Ireland that solely focuses on supporting children and young people during a parent's cancer.

Cancer is being diagnosed more in the under 50's age groups, where a high number will be parents, whilst lots of other organisations have a leaflet or a section on the website for these patients, other charities are not able to address or provide specific help or solutions like us, which are: -

- The alleviation of isolation for children and young people seeing a parent go through cancer
- Funding respite activities and support packs for these families to ease short term hardship.

Some organisations and charities offer children and young people's open days, but we found this to be a few times a year with the focus still being on the cancer patient as opposed to their children.

6.5- How we work with other providers

Referral systems are in place for other organisations to refer cancer patients who are parents to anyone under 18 to us, which in turn will help those charities to provide next step support via the services we offer.

Please refer to section 4.3 on who we are already working with.

7- Performance Monitoring

7.1- Key Performance Indicators (KPI's)

- Number of support packs posted out to children and young people who meet our specific criteria.
- Number of local respite activities funded.
- Sufficient funds to meet support packs and activities raised.
- Number of children and young people receiving our advice and support.
- Amount of significant publicity pieces, articles, and adverts
- Number of different healthcare providers/organisations and charities referring families to us.
- Number of new charities and organisations worked with.

7.2- Measurement of KPI's

- Support packs sent out are documented with the evidence and agreed criteria adhered to.
- Number of local respite activities documented (including cost), evidence and agreed criteria adhere to
- Funds are available and accessible to CEO/Coordinator and treasurer.
- Documentation is available and clear/can be explained. Suitable for children and young people to receive and understand.
- Requests are responded to within 10 days. Continuity of responder ideally where possible
- More referrals from new healthcare providers/organisations. More likes/follows on Facebook, Twitter & Instagram.
- More requests for support received.
- Named contact on behalf of The Osborne Trust and the children & young people we support.

7.3- Reporting of KPI's

- Documentation and CEO/Coordinator reporting to chair and trustees.
- Report back to quarterly meetings
- CEO/Treasurer's report to Trustees and CEO updating on fundraising activities
- CEO reports to Chair
- Evidence trail on social media channels/emails. CEO/ relevant trustees to report at meetings.
- CEO to provide update at meetings when appropriate.

8- Promotion/Marketing

8.1- How and where we promote our work

See Communications Plan

8.2- Current activity

A lot of our promotion and advertising is done across our social media channels (Facebook, Instagram & Twitter) Facebook has been our most successful, with over 4,000 followers and generated a lot of revenue through their fundraising avenues on the page. Twitter has been beneficial in creating links with NHS Trusts, practitioners, and other cancer services. Doing more on Linked in will be a focus going forward, it's not something we have maximised at present.

8.3 Website

Over the past year we have carried out a complete overhaul of our website so it's easy for the patient to access support for their kids and for the health practitioners to refer the families they are supporting over. Our new website was launched in June 2022. Additionally, we want to maximise what we have been up to and what we have and are doing in terms of support and fundraising through the site.

9- The Organisation

9.1- Board of Trustees

The following trustees were active during the year ending June 30th 2022

<u>Name</u>	<u>Position</u>	<u>Appointed</u>	<u>Resigned</u>
<u>Clare Griffiths</u>	<u>Chair Trustee</u>	<u>7th Dec 2014</u>	<u>N/A</u>
<u>Anwen Maher</u>	<u>Trustee</u>	<u>21st Nov 2019</u>	<u>N/A</u>
<u>Helen Daniels</u>	<u>Trustee</u>	<u>14th May 2021</u>	<u>N/A</u>
<u>Nicky Grayston</u>	<u>Trustee</u>	<u>20th Feb 2018</u>	<u>N/A</u>
<u>Aimee Parker</u>	<u>Treasurer/Trustee</u>	<u>7th Dec 2014</u>	<u>01/07/21</u>
<u>Jayne Rea</u>	<u>Trustee</u>	<u>1st July 2021</u>	<u>N/A</u>
<u>Elizabeth Owen</u>	<u>Trustee</u>	<u>7th Dec 2015</u>	<u>31/07/21</u>
<u>Sioned Davies</u>	<u>Trustee</u>	<u>21st Nov 2019</u>	<u>N/A</u>
<u>Angela Evans</u>	<u>Treasurer/Trustee</u>	<u>20th Feb 2018</u>	<u>N/A</u>
<u>Kelly Angus</u>	<u>Trustee</u>	<u>1st Oct 2021</u>	<u>N/A</u>

9.2- Staff

Emma Osborne Founder/CEO/Charity Coordinator

9.3- Volunteers

Due to the nature of The Trust, how we work and the fact we operate all over the UK virtually/remotely, our volunteer offer differs to other organisations.

Volunteering can often be through our fundraising events within the community as well as admin support and visiting hospitals all over the UK (pre covid) with our posters and leaflets.

9.4- Premises

The Trust currently has no accommodation assets.

9.5- New equipment and consumables

New equipment and consumables to enable the Trust to carry out its work will be purchased as necessary but will always seek to attain value for money.

Consumables to enable the Trust to carry out its work will be purchased as necessary but will always seek to attain value for money.

9.6- Policies and Procedures

The Trust has active policies covering the following: -

- Safeguarding
- Financial Management
- Reserves Policy
- Volunteer
- Risk Management
- GDPR & Data Protection
- Privacy Policy
- Equality and Diversity
- Welsh Language
- Trustee Expenses
- Trustees Code of Conduct

9.7- Risk

Please see Risk Management Policy

9.8- Trustees Recruitment/Appointment

Where vacancies arise on the board of trustees, a public advert will be made outlining the role, time and skills required and the nature of what being a trustee means in full, in line with guidance by the Charities Commission.

Officers' roles of the board are elected at the AGM.

10- Fundraising Strategy

10.1 General Funds

The Trust will seek to increase fundraising levels on 2021-2022 and will seek to develop fundraising strategy to provide greater structure and long-term security. Grants and funding will be applied for as in previous years.

10.2 Trading

The Trust trades on pre purchased, branded goods namely hoodies, pens, wristbands, mugs, coasters, tote bags and cards. Additionally, Ozzy the Elephant teddies (sent for free to children we support) which can be purchased alongside other animal teddies to plough back monies into the trust. These items are traded via our website www.theosbornetrust.com, eBay and on social media pages. Some branded merchandise is given to fundraising events and fundraisers for free to help raise awareness and funds for The Osborne Trust.

11- Trustees Report

Registered number: 1160073

Trustees' responsibilities in relation to the financial statements

The trustees are responsible for preparing a trustees' annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice). The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

The Charity Commission requires the trustees to prepare financial statements for each financial year. Under that law the trustees have elected to prepare the financial statements in accordance with United Kingdom Generally Accepted Accounting Practice (Financial Reporting Standard 102 and applicable law). The trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the situation of the charity and of the incoming resources and application of resources, including the income and expenditure, of the Charity for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently.
- make judgements and estimates that are reasonable and prudent.
- observe the methods and principles in the Charities SORP;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements.
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the company will continue in business.

The trustees are responsible for keeping adequate accounting records that are sufficient to show and explain the charities transactions and disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charity Commissions requirements. They are also responsible for safeguarding the assets of the Charity and hence for

taking reasonable steps for the prevention and detection of fraud and other irregularities.

Disclosure of information to independent examiners

Each person who was a Trustee at the time this report was approved confirms that:

- so far as she is aware, there is no relevant information of which the Charity's independent examiner is unaware; and
- she has taken all the steps that she ought to have taken as a Trustee to make herself aware of any relevant information and to establish that the Charity's independent examiner is aware of that information.

This report was approved by the board on 1/8/2022 and signed on its behalf.

Clare Griffiths Chair of Board of Trustees

12- Charity Information

Trustees

<u>Name</u>	<u>Position</u>	<u>Appointed</u>	<u>Resigned</u>
<u>Clare Griffiths</u>	<u>Chair Trustee</u>	<u>7th Dec 2014</u>	<u>N/A</u>
<u>Anwen Maher</u>	<u>Trustee</u>	<u>21st Nov 2019</u>	<u>N/A</u>
<u>Helen Daniels</u>	<u>Trustee</u>	<u>14th May 2021</u>	<u>N/A</u>
<u>Nicky Grayston</u>	<u>Trustee</u>	<u>20th Feb 2018</u>	<u>N/A</u>
<u>Jayne Rea</u>	<u>Trustee</u>	<u>1st July 2021</u>	<u>N/A</u>
<u>Sioned Davies</u>	<u>Trustee</u>	<u>21st Nov 2019</u>	<u>N/A</u>
<u>Angela Evans</u>	<u>Treasurer/Trustee</u>	<u>20th Feb 2018</u>	<u>N/A</u>
<u>Kelly Angus</u>	<u>Trustee</u>	<u>1st Oct 2021</u>	<u>N/A</u>

Independent Examiner

Michelle Ellis
TJC Accounting
Maes Y Gog
Rhyl
Denbighshire
LL18 4QA

Registered Offices

PO Box 349
Rhyl
Denbighshire
LL18 9HX

Registered Charity Number

1160073

13- Independents Examiners Report

Please see Unaudited Accounts Report

14- Financial Statement

Please see Unaudited Accounts Report

Balance Sheet

Please see Unaudited Accounts Report

Approved Clare Griffiths

Signature C L GRIFFITHS

Date 01/08/22

THE OSBORNE TRUST
Charity Number: 1160073
UNAUDITED ACCOUNTS
FOR THE YEAR ENDED 30 JUNE 2022

THE OSBORNE TRUST
Charity Number: 1160073

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number:

1160073

Correspondence Address:

PO Box 349
Rhyl
Denbighshire
LL18 4FP

Trustees/Committee

C Griffiths	(Chairperson)
H Daniels	
L Owen	(Resigned 31/07/21)
A C Parker	(Resigned 01/07/21)
N Grayson	
A Maher	
S Davies	
A Evans	
J Rea	(Appointed 01/07/21)
K Angus	(Appointed 01/10/21)

Independent Examiner

M Ellis
TJC Bookkeeping Solutions
3 Maes Y Gog
Rhyl
Denbighshire
LL18 4QA

THE OSBORNE TRUST
Charity Number: 1160073

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 30 JUNE 2022

	Restricted Funds £	Unrestricted Funds £	Total Funds 2022 £	Total Funds 2021 £
A1: INCOMING RESOURCES				
Fundraising		35,868	35,868	30,185
Donations		18,670	18,670	26,131
Sales		2,058	2,058	5,295
Restricted Grants Received	15,686		15,686	21,346
Unrestricted Grants Received		0	0	0
A2: ASSET AND INVESTMENT SALES				
Total incoming resources	<u>15,686</u>	<u>56,596</u>	<u>72,282</u>	<u>82,957</u>
A3: RESOURCES EXPENDED				
Fundraising Costs		5,133	5,133	7,702
Supplies (Ozzy)/Supporting Costs		2,952	2,952	2,240
Marketing		2,720	2,720	5,212
Website		3,638	3,638	126
Journals/Books	2,236	1,943	4,179	6,939
Family Activities	346	8,335	8,681	3,944
Lockdown Activities	422	615	1,037	2,253
Together Time		1,436	1,436	771
Trust Goes Outdoors	3,368	191	3,559	
Subscription		579	579	562
Office Costs		1,398	1,398	2,269
Insurance	364		364	340
Accountancy		895	895	799
Postage		4,490	4,490	4,375
Staff Costs	11,582	28,756	40,338	34,246
Training		90	90	0
Trustee Expenses		21	21	14
Cost of sales		3,149	3,149	5,972
Legal and Professional		182	182	
Bank Charges		74	74	
Total Resources Expended	<u>18,318</u>	<u>66,597</u>	<u>84,915</u>	<u>77,764</u>
A4: ASSET AND INVESTMENT PURCHASES				
			0	0
			<u>0</u>	<u>0</u>

THE OSBORNE TRUST
Charity Number: 1160073

OPERATING PROFIT / (LOSS)	(2,632)	(10,001)	(12,633)	5,193
----------------------------------	---------	----------	----------	-------

Transfers between funds

Balances Brought forward 1 July 2021	11,470	98,923	110,393	105,200
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Balances Brought forward 30 June 2022	8,838	88,922	97,760	110,393
--	-------	--------	--------	---------

	Restricted Funds £	Unrestricted Funds £	Total Funds 2022 £	Total Funds 2021 £
B1: CASH FUNDS				
Current Account	8,838	88,922	97,760	110,393
B2: OTHER MONETARY ASSETS		0	0	0
B3: INVESTMENT ASSETS		0	0	0
Total Current Assets	8,838	88,922	97,760	110,393

		Funds to which asset belongs	Cost	Current Value
B4: ASSETS RETAINED FOR THE CHARITIES OWN USE				
Photo Printer		Office Equipment	120	39
Ipad Pro		Office Equipment	797	327
IMac		Office Equipment	1,120	573
Office furniture		Furniture & fixtures	143	86
			3,055	1,025
B5: LIABILITIES	0	0	0	0
	0	0	0	0

Signed by one (or two) trustees on behalf of all the trustees

Signature: _____

Signature: _____

Print Name _____

Print Name: _____

Date of approval: _____

Date of approval: _____

THE OSBORNE TRUST
Charity Number: 1160073

**INDEPENDENT EXAMINER'S REPORT
FOR THE YEAR ENDED 30 JUNE 2022**

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE OSBORNE TRUST.

I report on the financial statements of the charity for the year ended 30 June 2022 which are set out on pages 3 to 4.

RESPECTIVE RESPONSIBILITIES OF THE TRUSTEES AND EXAMINER

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act"). I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 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.

BASIS OF THE INDEPENDENT EXAMINER'S REPORT

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

INDEPENDENT EXAMINER'S STATEMENT

I have completed my examination and I confirm that no material matters have come to my attention

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



.....
Michelle Ellis
3 Maes Y Gog
Rhyl
Denbighshire
LL18 4QA
Date: 7th October 2022

THE OSBORNE TRUST
Charity Number: 1160073
UNAUDITED ACCOUNTS
FOR THE YEAR ENDED 30 JUNE 2022

THE OSBORNE TRUST
Charity Number: 1160073

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number:

1160073

Correspondence Address:

PO Box 349
Rhyl
Denbighshire
LL18 4FP

Trustees/Committee

C Griffiths	(Chairperson)
H Daniels	
L Owen	(Resigned 31/07/21)
A C Parker	(Resigned 01/07/21)
N Grayson	
A Maher	
S Davies	
A Evans	
J Rea	(Appointed 01/07/21)
K Angus	(Appointed 01/10/21)

Independent Examiner

M Ellis
TJC Bookkeeping Solutions
3 Maes Y Gog
Rhyl
Denbighshire
LL18 4QA

THE OSBORNE TRUST
Charity Number: 1160073

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 A4: ASSET AND INVESTMENT PURCHASES				
			0	0
			<u>0</u>	<u>0</u>

THE OSBORNE TRUST
Charity Number: 1160073

OPERATING PROFIT / (LOSS)	(2,632)	(10,001)	(12,633)	5,193
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Office furniture		Furniture & fixtures	143	86
			3,055	1,025
B5: LIABILITIES	0	0	0	0
	0	0	0	0

Signed by one (or two) trustees on behalf of all the trustees

Signature: _____

Signature: _____

Print Name _____

Print Name: _____

Date of approval: _____

Date of approval: _____

THE OSBORNE TRUST
Charity Number: 1160073

**INDEPENDENT EXAMINER'S REPORT
FOR THE YEAR ENDED 30 JUNE 2022**

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE OSBORNE TRUST.

I report on the financial statements of the charity for the year ended 30 June 2022 which are set out on pages 3 to 4.

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

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 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act have not been met; or
2. to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



.....
Michelle Ellis
3 Maes Y Gog
Rhyl
Denbighshire
LL18 4QA
Date: 7th October 2022

THE OSBORNE TRUST

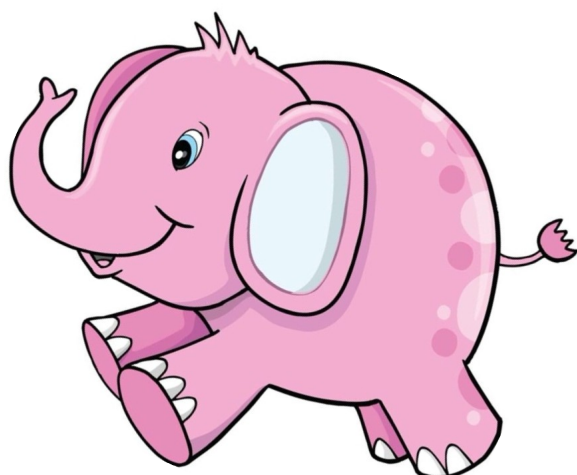
England & Wales - Charity number 1160073

Accounts



**SUPPORTING CHILDREN DURING A PARENT'S
CANCER
ACROSS THE UK**

JULY 2020-JUNE 2021



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1- Executive Summary

The Osborne Trust (the 'Charity') is a registered charity in England and Wales (1160073). Founded in July 2014 from Rhuddlan in North Wales and operates throughout the UK & Northern Ireland, with majority of its work taking place in England and Wales. The Osborne Trust now has its headquarters in Rhyl in North Wales.

1.1 Rationale

The charity was set up in response to a supposed lack of support for children during a parents cancer. The founder has personal experience of being diagnosed with cancer with 2 young children. Her encounter of finding no support for her own children generated her desire to provide other children whose Mum/Dad have cancer with the support she found lacking for her 2 children.

The Osborne Trust mission statement is

Supporting children during a parent's cancer

And support families were

- a) A parent receives a cancer diagnosis and have children under the age of 18 living at home with them

The Osborne Trust vision is:

Every child who sees a parent go through cancer can access emotional and practical support from the Trust.

1.2 Structure

The Osborne Trust currently has one full time staff member and a strong board of trustees/management committee drawn from various sectors with a wide range of skills and expertise, in addition to a personal experience of cancer. The current staff team consists of a CEO/Charity Manager.

All trustees provide their time in a voluntary capacity.

1.3 July 2020-June 2021

The Osborne Trust is now in its 7th year and is still the only charity focusing solely on supporting children during a parent's cancer across the whole of the UK. Our core support programmes and

packages we provide is funded entirely by donations fundraising and some grant funding. All our support services are provided free of charge to families.

The funds raised by The Osborne Trust is generated by charity led fundraising activities, sales of branded merchandise, as well as our Ozzy & friends teddies and accessories. Alongside this, fundraising and donations from individuals, community groups and businesses as well as sourcing grants and funding wherever possible.

Funds have been used effectively to support our core areas of support. These are reducing isolation for children through a local respite activity, providing comfort through our Ozzy the Elephant teddy and equipping children and young people with mindfulness tools such as a journal, books and colouring to assist their emotional well-being.

Our profile about what we do and who we support has increased significantly amongst both the medical/cancer sector and the public. Primarily this has been done through contacting every Macmillan Information and Support Hubs across the UK as well as strengthening our existing relationships with charities and practitioners. The families we have supported are also important ambassadors for us to help promote to the work we do.

Like all small charities, The Trust had to respond to the Covid 19 pandemic during the last 12 months. We adapted quickly by moving our local respite activities to lockdown/shielding activities, which could be used within the home to encourage family time as well as opportunities for children and young people to have some alone time too. We were able to adapt and provide the support to the families in a way that they needed it. We continued to operate as we always had and made ourselves as available as we had pre pandemic to meet the needs of our families. Since we only have 1 paid staff member who works from home, we were not impacted by the government announcement to work from home and were already set up to do so.

The Trust had to look at new and innovative ways for its income streams, luckily, we already had a strong online presence across our social media platforms and were able to move several fundraising opportunities online to generate income. We were able to tap into specific covid 19 monies available and were able to maintain income at a consistent level, with only a 10k shortfall in revenue.

1.4 2021-2026

As The Osborne Trust moves into its 8th year and beyond, much of our work will be around increasing the number of children and young people we support and tailoring this support to their needs from their feedback. Our work continues to be led by the children and young people we support. Our strategic aims over the next 5 years are as follows:

- To continue to support children and young people through our core support programmes
- To offer high school aged children access to peer to peer support through activity-based group exercise and activities
- To ensure cancer patients who are parents to under 18-year-olds receive consistent and accurate advice regarding support on offer for their children.
- To ensure families are signposted to FREE support programmes and packages to assist their children during their cancer and not signposted to those where they must pay for any support for their children.
- To increase the number of staff in order to meet the increasing demand and geographical spread of our work.
- To create and manage a volunteer structure and corresponding policy.

Specific goals for the next 5 years are set out in section 5

Emma Osborne
Founder/CEO/Charity Coordinator

2- Organisational Details

2.1 Charity Name

The Osborne Trust

2.2 Registered Address

Po Box 349, Rhyl, Denbighshire, LL18 9HX, Wales

2.3 Correspondence Address

Po Box 349, Rhyl, Denbighshire, LL18 9HX, Wales

2.4 Telephone Number

07712 089273

2.5 Email

the-osborne-trust@outlook.com

2.6 Website

www.theosbornetrust.com

2.7 Legal Status

Registered Charity in England and Wales No: 1160073

HMRC Charities Ref: EW29751

Member of the Fundraising Regulator

2.8 Objects

The Trusts objects, as listed on the Charity Commission are specifically related to the following:

The relief of sickness and need, and the preservation of health for children affected by their parent's cancer:

- a) To provide children and young people aged 16 years and under whose parents have cancer some time out activities during their parent's cancer treatment by funding these activities.
- b) For the provision of activities that will bring comfort to children under 16 years of age whilst their parents have cancer, which will in turn have a beneficial effect on the well-being of the family during this time
- c) To fund the provision of leisure services/activities for children and young people where the parent has cancer, such as plays centre activities, cinema tickets bowling passes etc to relieve the stress placed upon families during cancer treatment by paying for these to take place.

3- The Osborne Trust

3.1 Vision

To support every child & young person living with a parent undergoing cancer treatment.

3.2 Mission Statement

Supporting children during a parent's cancer treatment.

To achieve this as a charity we aim to reduce children and young people's isolation, provide mindfulness tools to feel better able to cope and provide emotional support through our core support programmes and packages.

3.3 Values

The work of The Osborne Trust reflects the key principles and values of the Charity, upheld by its Board of Trustees- confidentiality, transparency, equal opportunities for all and the unique circumstances of each person/family supported.

3.4 What we do

Charitable activities are provided through 5 main priorities:

1. Offering each child referred into our service a support pack made up of items they identify they need such as our Ozzy teddy for comfort, journaling for mindfulness, flashcards for younger children and colouring.
2. Funding local respite activities to reduce children's feelings of isolation. Unexpected costs arise after a cancer diagnosis, there is a massive financial impact for most families. We will fund for children and young people to get some 'time away' from seeing Mum/Dad at their worst through treatment and go off to 'enjoy' a trip to a farm park, watch a movie, go bowling, jump around at a trampoline park or even some food at the local pizza place.
3. Bringing families together on our Together Time activities to reduce children's isolation. They may be the only child at school whose parent has cancer, but by bringing families together, we are showing them they are not the only ones.
4. Supporting children's emotional well-being as they see their parent go through cancer, through mindfulness tools & respite activities.
5. Providing a one stop shop for advice and information about a cancer diagnosis for a parent with children on how best to support their child/ren, including links to localised services and signposting to other organisations who can offer help.

4- Background and Achievements to Date

4.1- Background

The Osborne Trust was founded after our founder/CEO was diagnosed with cancer age 36 years with children aged 7 & 4 and finding no support on offer for them.

Emma was diagnosed in 2013 and spent 10 months going through cancer treatment, operation, chemotherapy, and radiotherapy, with many hospitals stays due to infections and complications.

Throughout this time Emma's thoughts were always on how best to support her children. She asked at every appointment was there anything locally or nationally that could support the kids and was met with a brick wall, she found lots of services for herself but nothing specifically focusing on supporting her children through this time.

The family got through it by planning activities around Emma's treatment. Dad would take the kids off to the cinema, a play centre, a farm park so Emma could have some time to rest, and the kids got out of the house from seeing Emma so poorly from her gruelling treatment.

At the same time as Emma's treatment, an old family friend was diagnosed with cancer with 3 teenage children and was self-employed with very little income coming in. This got Emma thinking about the financial implications a cancer diagnosis has for a family and how getting a day out or going to the cinema could be a luxury that stopped when a parent had cancer due to money worries. From there the first ideas for the Trust was born.

Emma finished her treatment in the February of 2014 and once through this she got to work on looking into setting up a charity to support children during a parent's cancer. She asked her own children what they would have found beneficial, one idea was a teddy to cuddle and provide comfort for when Emma was in hospital and Ozzy the Elephant was born.

4.2: The Osborne's Trusts Volunteers and Supporters

The Trust has established a dedicated team of volunteers through our Trustees,

Fundraising/Events volunteers, professional advisors, and ambassadors, without

whom our charitable activities could not be carried out. These individuals give up their free time to help us continue our work here at the charity.

4.3- Partner Organisations

Strong working relationships have been developed with both hospitals, cancer centres and cancer related charities across the UK namely:

- North Wales Cancer Centre
- Clatterbridge Cancer Centres
- The Christie Hospital
- Macmillan Cancer Support
- Mummy's Star
- Maggie's Centres
- Clic Sargent now Young Lives V's Cancer
- Young Breast Cancer Network (YBCN)
- NHS Hospitals
- NHS GP Surgeries

We have received many referrals from the above organisations and have also had the opportunity to speak to their teams to inform them of the work we do with children and young people during a parent's cancer. This has helped establish how we can better work together in the future for the most benefit of the children within a patients' family.

Over the past 12 months we have contacted every Macmillan Information and Support Hub across the UK and from this have seen an increase in referrals from areas we have struggled with previously such as mid and south Wales and the Merseyside areas.

4.4 Profile

Growth in our profile and charity awareness has been positive thanks to our social media pages and engagement on these. We have received a major boost to our profile over the past year thanks to working with the parentship organisations listed above.

We help any parent we have supported to raise awareness about the Trust and our work in supporting children. By sharing their story across social media channels and the general media they spread the news of who we are and what we do.

5- Our Goals

5.1- 2014-2021

Such has been the growth of the Trust since we first started, we have needed to reflect upon what has been achieved so we can plan accordingly. It is evident that our core support of the local respite activities and our support packs are working well and require little development bar any new products that come on the market which may be beneficial. Our together time, where we bring families together so children and young people can see they aren't the only ones needs more development as covid didn't allow us to maximise this in the last year. Our peer-to-peer support work will be developed over the next 12 months for the older ages 10-18 years. Promotion of what we do needs to increase to enable us to reach many more families than we do presently

5.2- Next 12 months

- To continue to provide our support packages to children of all ages.
- To fund up to 3 respite local activities for children during a parent cancer.
- To increase the partner organisations we work closely with so we can reach many more families.
- Carry out a pilot peer to peer project through outdoor activities within the North Wales and Northwest regions (conditions of the funding received)
- Look to employ an additional member of staff
- Continue to diversify our income to ensure our long-term sustainability
- Create a volunteer structure which details the opportunities we offer and the benefits of volunteering with us.
- Maintain existing relationship and build new ones with other charities and cancer organisations, especially hospitals in certain regions where our support is not as high.

5.3- 5-year forecast

- Be the go-to service that health/cancer practitioners refer the children of their patients to.
- Reach over 50% of parents who have been diagnosed with cancer and have children living with them.
- Raise 250k in income by 2027.

- Employ coordinators in at least 2 counties in England (paid or voluntary capacity).
- Hold at least 6 months operational costs in case of any risk or having to wind the charity down.

6- Benefit/Need

6.1- What is the benefit/need to the public

Reducing isolation and supporting the emotional wellbeing of the children of a parent with cancer

6.2- Who will benefit

The Trust focuses on supporting children and young where: -

- Mum or Dad is newly diagnosed with cancer
- Mum or Dad is undergoing cancer treatment
- Mum or Dad has a secondary/terminal cancer diagnosis, we will support throughout
- Mum or Dad loses their life from cancer whilst we have supported them in the past and are supporting them.

6.3- How will they benefit

The Trust seeks to reduce children and young people's isolation and support their emotional and mental wellbeing when Mum or Dad is going through cancer by: -

- Funding up to the 3 local respite activities to reduce their isolation
- Bring children and young people together with others to reduce their isolation
- Relieve some of the financial burdens incurred because of the cancer diagnosis
- Advise and support children and young to look after their mental and emotional wellbeing through our support packages
- Advise, support, and share knowledge to support a parent with children going through cancer.
- Offer peer to peer mentoring support through outdoor based activities.

6.4 What similar services/organisations are currently available?

We haven't been able to find any other cancer charity that works across the UK and Northern Ireland that solely focuses on supporting children and young people during a parent's cancer.

Cancer is being diagnosed more in the under 50's age groups, where a high number will be parents, whilst lots of other organisations have a leaflet or a section on the website for these patients, other charities are not able to address or provide specific help or solutions like us, which are: -

- The alleviation of isolation for children and young people seeing a parent go through cancer
- Funding respite activities and support packs for these families to ease short term hardship.

Some organisations and charities offer children and young people's open days, but we found this to be a few times a year with the focus still being on the cancer patient as opposed to their children.

6.5- How we work with other providers

Referral systems are in place for other organisations to refer cancer patients who are parents to anyone under 18 to us, which in turn will help those charities to provide next step support via the services we offer.

Please refer to section 4.3 on who we are already working with.

7- Performance Monitoring

7.1- Key Performance Indicators (KPI's)

- Number of support packs posted out to children and young people who meet our specific criteria.
- Number of local respite activities funded.
- Sufficient funds to meet support packs and activities raised.
- Number of children and young people receiving our advice and support.
- Amount of significant publicity pieces, articles, and adverts
- Number of different healthcare providers/organisations and charities referring families to us.
- Number of new charities and organisations worked with.

7.2- Measurement of KPI's

- Support packs sent out are documented with the evidence and agreed criteria adhered to.
- Number of local respite activities documented (including cost), evidence and agreed criteria adhere to
- Funds are available and accessible to CEO/Coordinator and treasurer.
- Documentation is available and clear/can be explained. Suitable for children and young people to receive and understand.
- Requests are responded to within 10 days. Continuity of responder ideally where possible
- More referrals from new healthcare providers/organisations. More likes/follows on Facebook, Twitter & Instagram.
- More requests for support received.
- Named contact on behalf of The Osborne Trust and the children & young people we support.

7.3- Reporting of KPI's

- Documentation and CEO/Coordinator reporting to chair and trustees.
- Report back to quarterly meetings
- CEO/Treasurer's report to Trustees and CEO updating on fundraising activities
- CEO reports to Chair
- Evidence trail on social media channels/emails. CEO/ relevant trustees to report at meetings.
- CEO to provide update at meetings when appropriate.

8- Promotion/Marketing

8.1- How and where we promote our work

See Communications Plan

8.2- Current activity

A lot of our promotion and advertising is done across our social media channels (Facebook, Instagram & Twitter) Facebook has been our most successful, with over 4,000 followers and generated a lot of revenue through their fundraising avenues on the page. Twitter has been beneficial in creating links with NHS Trusts, practitioners, and

other cancer services. Doing more on Linked in will be a focus going forward, it's not something we have maximised at present.

8.3 Website

2021/2022 year will see a complete overhaul of our website so it's easy for the patient to access support for their kids and for the health practitioners to refer the families they are supporting over. Additionally, we want to maximise what we have been up to and what we have and are doing in terms of support and fundraising through the site.

9- The Organisation

9.1- Board of Trustees

The following trustees were active during the year ending June 30th 2021

<u>Name</u>	<u>Position</u>	<u>Appointed</u>	<u>Resigned</u>
<u>Clare Griffiths</u>	<u>Chair Trustee</u>	<u>7th Dec 2014</u>	<u>N/A</u>
<u>Emma Osborne</u>	<u>CEO/Trustee</u>	<u>7th Dec 2014</u>	<u>13 May 2021</u>
<u>Helen Daniels</u>	<u>Trustee</u>	<u>14th May 2021</u>	<u>N/A</u>
<u>Nicky Grayston</u>	<u>Trustee</u>	<u>20th Feb 2018</u>	<u>N/A</u>
<u>Anwen Maher</u>	<u>Trustee</u>	<u>21st Nov 2019</u>	<u>N/A</u>
<u>Aimee Parker</u>	<u>Treasurer/Trustee</u>	<u>7th Dec 2014</u>	<u>N/A</u>
<u>Elizabeth Owen</u>	<u>Trustee</u>	<u>7th Dec 2015</u>	<u>N/A</u>
<u>Sioned Davies</u>	<u>Trustee</u>	<u>21st Nov 2019</u>	<u>N/A</u>
<u>Angela Evans</u>	<u>Secretary/Trustee</u>	<u>20th Feb 2018</u>	<u>N/A</u>

9.2- Staff

Emma Osborne Founder/CEO/Charity Coordinator

9.3- Volunteers

Due to the nature of The Trust, how we work and the fact we operate all over the UK virtually/remotely, our volunteer offer differs to many organisations.

Volunteering can often be through our fundraising events within the community as well as admin support and visiting hospitals all over the UK (pre covid) with our posters and leaflets.

9.4- Premises

The Trust currently has no accommodation assets.

9.5- New equipment and consumables

New equipment and consumables to enable the Trust to carry out its work will be purchased as necessary but will always seek to attain value for money.

Consumables to enable the Trust to carry out its work will be purchased as necessary but will always seek to attain value for money.

9.6- Policies and Procedures

The Trust has active policies covering the following: -

- Safeguarding
- Financial Management
- Reserves Policy
- Volunteer
- Risk Management
- GDPR & Data Protection
- Privacy Policy
- Equality and Diversity
- Welsh Language
- Trustee Expenses
- Trustees Code of Conduct

9.7- Risk

Please see Risk Management Policy

9.8- Trustees Recruitment/Appointment

Where vacancies arise on the board of trustees, a public advert will be made outlining the role, time and skills required and the nature of what being a trustee means in full, in line with guidance by the Charities Commission.

Officers' roles of the board are elected at the AGM.

10- Fundraising Strategy

10.1 General Funds

The Trust will seek to increase fundraising levels on 2020-2021 and will seek to develop fundraising strategy to provide greater structure and long-term security. Grants and funding will be applied for as in previous years.

10.2 Trading

The Trust trades on pre purchased, branded goods namely hoodies, pens, wristbands, mugs, coasters, tote bags and cards. Additionally, Ozzy the Elephant teddies (sent for free to children we support) which can be purchased alongside other animal teddies to plough back monies into the trust. These items are traded via our website www.theosbornetrust.com, eBay and on social media pages. Some branded merchandise is given to fundraising events and fundraisers for free to help raise awareness and funds for The Osborne Trust.

11- Trustees Report

Registered number: 1160073

Trustees' responsibilities in relation to the financial statements

The trustees are responsible for preparing a trustees' annual report and financial statements in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice). The trustees consider that an audit is not required for this year under section 144(2) of the Charities Act 2011 (the 2011 Act) and that an independent examination is needed.

The Charity Commission requires the trustees to prepare financial statements for each financial year. Under that law the trustees have elected to prepare the financial statements in accordance with United

Kingdom Generally Accepted Accounting Practice (Financial Reporting Standard 102 and applicable law). The trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the situation of the charity and of the incoming resources and application of resources, including the income and expenditure, of the Charity for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently.
- make judgements and estimates that are reasonable and prudent.
- observe the methods and principles in the Charities SORP;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements.
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the company will continue in business.

The trustees are responsible for keeping adequate accounting records that are sufficient to show and explain the charities transactions and disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charity Commissions requirements. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Disclosure of information to independent examiners

Each person who was a Trustee at the time this report was approved confirms that:

- so far as she is aware, there is no relevant information of which the Charity's independent examiner is unaware; and
- she has taken all the steps that she ought to have taken as a Trustee to make herself aware of any relevant information and to establish that the Charity's independent examiner is aware of that information.

This report was approved by the board on 13 July 2021 and signed on its behalf.

12- Charity Information

Trustees

<u>Name</u>	<u>Position</u>	<u>Appointed</u>	<u>Resigned</u>
<u>Clare Griffiths</u>	<u>Chair Trustee</u>	<u>7th Dec 2014</u>	<u>N/A</u>
<u>Emma Osborne</u>	<u>CEO/Trustee</u>	<u>7th Dec 2014</u>	<u>13 May 2021</u>
<u>Helen Daniels</u>	<u>Trustee</u>	<u>14th May 2021</u>	<u>N/A</u>
<u>Nicky Grayston</u>	<u>Trustee</u>	<u>20th Feb 2018</u>	<u>N/A</u>
<u>Anwen Maher</u>	<u>Trustee</u>	<u>21st Nov 2019</u>	<u>N/A</u>
<u>Aimee Parker</u>	<u>Treasurer/Trustee</u>	<u>7th Dec 2014</u>	<u>N/A</u>
<u>Elizabeth Owen</u>	<u>Trustee</u>	<u>7th Dec 2015</u>	<u>N/A</u>
<u>Sioned Davies</u>	<u>Trustee</u>	<u>21st Nov 2019</u>	<u>N/A</u>
<u>Angela Evans</u>	<u>Secretary/Trustee</u>	<u>20th Feb 2018</u>	<u>N/A</u>

Independent Examiner

Michelle Ellis
TJC Accounting
Maes Y Gog
Rhyl
Denbighshire
LL18 4QA

Registered Offices

PO Box 349
Rhyl
Denbighshire
LL18 9HX

Registered Charity Number

13- Independents Examiners Report

Please see Unaudited Accounts Report

14- Financial Statement

14.1 Statement

Please see Unaudited Accounts Report

14.2 Balance Sheet

Please see Unaudited Accounts Report

14.3 Notes to Account

For the year end June 30th, 2021

**1- Summary of significant accounting polices
Basis of preparation**

The financial statements have been prepared in accordance with Accounting and Reporting by Charities Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1January 2015) - (Charities SORP (FRS 102)).

The Charity meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy note(s).

Income

Income is recognised when the Charity has entitlement to the funds, any performance conditions attached to the item(s) of income have been met, it is probable that the income will be received, and the amount can be measured reliably.

Income from government and other grants, whether 'capital' grants or 'revenue' grants, is recognised when the Charity has entitlement to the funds, any performance conditions attached to the grants

have been met, it is probable that the income will be received, and the amount can be measured reliably and is not deferred.

For legacies, if applicable, entitlement is taken as the earlier of the date on which either: the Charity is aware that probate has been granted, the estate has been finalised and notification has been made by the executor(s) to the Trust that a distribution will be made, or when a distribution is received from the estate.

Receipt of a legacy, in whole or in part, is only considered probable when the amount can be measured reliably, and the Charity has been notified of the executor's intention to make a distribution. Where legacies have been notified to the Charity, or the Charity is aware of the granting of probate, and the criteria for income recognition have not been met, then the legacy is treated as a contingent asset and disclosed if material.

Income received in advance of the provision of specified services is deferred until the criteria for income recognition is met.

Donates services and facilities

Donated professional services and donated facilities are recognised as income when the Charity has control over the item, any conditions associated with the donated item have been met, the receipt of economic benefit from the use by the Charity of the item is probable and that economic benefit can be measured reliably. In accordance with the Charities SORP (FRS 102), general volunteer time is not recognised.

On receipt, donated professional services and donated facilities are recognised based on the value of the gift to the Charity which is the amount the Charity would have been willing to pay to obtain services or facilities of equivalent economic benefit on the open market; a corresponding amount is then recognised in expenditure in the period of receipt.

Interest receivable

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the Charity; this is normally upon notification of the interest paid or payable by the Bank.

Fund accounting

Unrestricted funds are available to spend on activities that further any of the purposes of Charity. Designated funds are unrestricted funds of the Charity which the trustees have decided at their discretion to set aside to use for a specific purpose. Restricted funds are donations which the donor has specified are to be solely used for specific areas of the Charity's work or for specific projects being undertaken by the Charity.

Tangible fixed assets

Tangible fixed assets are measured at cost less accumulative depreciation and any accumulative impairment losses.

Depreciation is provided on all tangible fixed assets, other than freehold land, at rates calculated to write off the cost, less estimated residual value, of each asset evenly over its expected useful life, as follows:

- Fixtures, fittings and equipment over 3 years

Debtors

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

Cash at bank and in hand

Cash at bank and cash in hand includes cash and short term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account.

Creditors

Creditors and provisions are recognised where the Charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

14.5 Detailed profit and loss account

Please see Unaudited Accounts Report

Approved Clare Griffiths

Signature

Date

13/7/21

THE OSBORNE TRUST
Charity Number: 1160073
UNAUDITED ACCOUNTS
FOR THE YEAR ENDED 30 JUNE 2021

THE OSBORNE TRUST
Charity Number: 1160073

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number:

1160073

Correspondence Address:

PO Box 349
Rhyl
Denbighshire
LL18 4FP

Trustees/Committee

C Griffiths	(Chairperson)
E Osborne	(Resigned 13 May 21)
H Daniels	(Appointed 14 May 21)
L Owen	
A C Parker	
N Grayson	
A Maher	
S Davies	
A Evans	

Independent Examiner

M Ellis
TJC Bookkeeping Solutions
3 Maes Y Gog
Rhyl
Denbighshire
LL18 4QA

THE OSBORNE TRUST
Charity Number: 1160073

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 30 JUNE 2021

	Restricted Funds £	Unrestricted Funds £	Total Funds 2021 £	Total Funds 2020 £
A1: INCOMING RESOURCES				
Fundraising		30,185	30,185	35,144
Donations		26,131	26,131	34,721
Sales		5,295	5,295	2,437
Restricted Grants Received	21,346		21,346	36,267
Unrestricted Grants Received		0	0	0
A2: ASSET AND INVESTMENT SALES				
Total incoming resources	<u>21,346</u>	<u>61,611</u>	<u>82,957</u>	<u>108,569</u>
A3: RESOURCES EXPENDED				
Fundraising Costs		7,702	7,702	5,185
Supplies (Ozzy)/Supporting Costs		2,240	2,240	8,175
Marketing		5,212	5,212	8,605
Website		126	126	135
Journals/Books	5,006	1,933	6,939	1,594
Family Activities	2,097	1,847	3,944	7,042
Lockdown Activities	2,207	46	2,253	2,584
Together Time	518	253	771	6,200
Subscription		562	562	562
Office Costs		2,269	2,269	1,186
Insurance		340	340	312
Accountancy		799	799	816
Postage		4,375	4,375	4,886
Staff Costs	10,134	24,112	34,246	32,998
Training		0	0	0
Trustee Expenses		14	14	68
Cost of sales		5,972	5,972	5,179
Total Resources Expended	<u>19,962</u>	<u>57,802</u>	<u>77,764</u>	<u>85,527</u>
A4: ASSET AND INVESTMENT PURCHASES				
			0	143
			<u>0</u>	<u>143</u>

THE OSBORNE TRUST
Charity Number: 1160073

OPERATING PROFIT / (LOSS)	1,384	3,809	5,193	22,899
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Transfers between funds

Balances Brought forward 1 July 2020	10,086	95,114	105,200	82,301
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Balances Brought forward 30 June 2021	11,470	98,923	110,393	105,200
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	Restricted Funds £	Unrestricted Funds £	Total Funds 2021 £	Total Funds 2020 £
B1: CASH FUNDS				
Current Account	11,470	98,923	110,393	105,200
B2: OTHER MONETARY ASSETS		0	0	0
B3: INVESTMENT ASSETS		0	0	0
Total Current Assets	11,470	98,923	110,393	105,200

B4: ASSETS RETAINED FOR THE CHARITIES OWN USE		Funds to which asset belongs	Cost	Current Value
Office furniture		Furniture & Fixtures	784	157
Photo Printer		Office Equipment	120	49
Gazebo		Furniture & fixtures	91	18
Ipad Pro		Office Equipment	797	408
IMac		Office Equipment	1,120	717
Office furniture		Furniture & fixtures	143	114
			3,055	1,463
B5: LIABILITIES	0	0	0	0
	0	0	0	0

Signed by one (or two) trustees on behalf of all the trustees

Signature: _____

Signature: _____

Print Name _____

Print Name: _____

Date of approval: _____

Date of approval: _____

THE OSBORNE TRUST
Charity Number: 1160073

INDEPENDENT EXAMINER'S REPORT
FOR THE YEAR ENDED 30 JUNE 2021

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE OSBORNE TRUST.

I report on the financial statements of the charity for the year ended 30 June 2021 which are set out on pages 3 to 4.

RESPECTIVE RESPONSIBILITIES OF THE TRUSTEES AND EXAMINER

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

Having satisfied myself that the charity is not subject to an audit under charity law and is eligible for independent examination, it is my responsibility to:

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

BASIS OF THE INDEPENDENT EXAMINER'S REPORT

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

INDEPENDENT EXAMINER'S STATEMENT

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

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



.....
Michelle Ellis
3 Maes Y Gog
Rhyl

Denbighshire
LL18 4QA

Date: 14 November 2021

THE OSBORNE TRUST
Charity Number: 1160073
UNAUDITED ACCOUNTS
FOR THE YEAR ENDED 30 JUNE 2021

THE OSBORNE TRUST
Charity Number: 1160073

REFERENCE AND ADMINISTRATIVE DETAILS

Registered Charity Number:

1160073

Correspondence Address:

PO Box 349
Rhyl
Denbighshire
LL18 4FP

Trustees/Committee

C Griffiths (Chairperson)
E Osborne (Resigned 13 May 21)
H Daniels (Appointed 14 May 21)
L Owen
A C Parker
N Grayson
A Maher
S Davies
A Evans

Independent Examiner

M Ellis
TJC Bookkeeping Solutions
3 Maes Y Gog
Rhyl
Denbighshire
LL18 4QA

THE OSBORNE TRUST
Charity Number: 1160073

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 30 JUNE 2021

	Restricted Funds £	Unrestricted Funds £	Total Funds 2021 £	Total Funds 2020 £
A1: INCOMING RESOURCES				
Fundraising		30,185	30,185	35,144
Donations		26,131	26,131	34,721
Sales		5,295	5,295	2,437
Restricted Grants Received	21,346		21,346	36,267
Unrestricted Grants Received		0	0	0
A2: ASSET AND INVESTMENT SALES				
Total incoming resources	<u>21,346</u>	<u>61,611</u>	<u>82,957</u>	<u>108,569</u>
A3: RESOURCES EXPENDED				
Fundraising Costs		7,702	7,702	5,185
Supplies (Ozzy)/Supporting Costs		2,240	2,240	8,175
Marketing		5,212	5,212	8,605
Website		126	126	135
Journals/Books	5,006	1,933	6,939	1,594
Family Activities	2,097	1,847	3,944	7,042
Lockdown Activities	2,207	46	2,253	2,584
Together Time	518	253	771	6,200
Subscription		562	562	562
Office Costs		2,269	2,269	1,186
Insurance		340	340	312
Accountancy		799	799	816
Postage		4,375	4,375	4,886
Staff Costs	10,134	24,112	34,246	32,998
Training		0	0	0
Trustee Expenses		14	14	68
Cost of sales		5,972	5,972	5,179
Total Resources Expended	<u>19,962</u>	<u>57,802</u>	<u>77,764</u>	<u>85,527</u>
A4: ASSET AND INVESTMENT PURCHASES				
			0	143
			<u>0</u>	<u>143</u>

THE OSBORNE TRUST
Charity Number: 1160073

OPERATING PROFIT / (LOSS)	1,384	3,809	5,193	22,899
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Transfers between funds

Balances Brought forward 1 July 2020	10,086	95,114	105,200	82,301
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Balances Brought forward 30 June 2021	11,470	98,923	110,393	105,200
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	Restricted Funds £	Unrestricted Funds £	Total Funds 2021 £	Total Funds 2020 £
B1: CASH FUNDS				
Current Account	11,470	98,923	110,393	105,200
B2: OTHER MONETARY ASSETS		0	0	0
B3: INVESTMENT ASSETS		0	0	0
Total Current Assets	11,470	98,923	110,393	105,200

B4: ASSETS RETAINED FOR THE CHARITIES OWN USE		Funds to which asset belongs	Cost	Current Value
Office furniture		Furniture & Fixtures	784	157
Photo Printer		Office Equipment	120	49
Gazebo		Furniture & fixtures	91	18
Ipad Pro		Office Equipment	797	408
IMac		Office Equipment	1,120	717
Office furniture		Furniture & fixtures	143	114
			3,055	1,463
B5: LIABILITIES	0	0	0	0
	0	0	0	0

Signed by one (or two) trustees on behalf of all the trustees

Signature: _____

Signature: _____

Print Name _____

Print Name: _____

Date of approval: _____

Date of approval: _____

THE OSBORNE TRUST
Charity Number: 1160073

INDEPENDENT EXAMINER'S REPORT
FOR THE YEAR ENDED 30 JUNE 2021

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE OSBORNE TRUST.

I report on the financial statements of the charity for the year ended 30 June 2021 which are set out on pages 3 to 4.

RESPECTIVE RESPONSIBILITIES OF THE TRUSTEES AND EXAMINER

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

Having satisfied myself that the charity is not subject to an audit under charity law and is eligible for independent examination, it is my responsibility to:

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

BASIS OF THE INDEPENDENT EXAMINER'S REPORT

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

INDEPENDENT EXAMINER'S STATEMENT

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

1. which gives me reasonable cause to believe that in, any material respect, the requirements:
 - to keep accounting records in accordance with section 130 of the Charities Act; and
 - to prepare accounts which accord with the accounting records and comply with the accounting requirements of the Charities Act have not been met; or
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Michelle Ellis
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Date: 14 November 2021