

**REPORT OF THE TRUSTEES AND
UNAUDITED FINANCIAL STATEMENTS FOR THE YEAR ENDED 31ST DECEMBER 2022
FOR
THE ANNE ROBSON TRUST**

Menzies LLP
Richmond House
Walkern Road
Stevenage
Hertfordshire
SG1 3QP

THE ANNE ROBSON TRUST
CONTENTS OF THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31ST DECEMBER 2022

	Page
Reference and administrative details	1
Report of the trustees	2 to 5
Independent examiner's report	6
Statement of financial activities	7
Statement of financial position	8
Notes to the financial statements	9 to 15

THE ANNE ROBSON TRUST

REFERENCE AND ADMINISTRATIVE DETAILS
FOR THE YEAR ENDED 31ST DECEMBER 2022

Trustees	R P Cotton P J Carter F K McKenzie T M Cotter L Abraham J A Holding M J Bentall (resigned 15/8/22) A Ranchod (resigned 7/5/22)	
Principal address	Units A3 & A4 17 High Street Stevenage Hertfordshire SG1 3UN	Mindenhall Court
Registered charity number	1178352	
Independent examiner	Menzies LLP Richmond House Walkern Road Stevenage Hertfordshire SG1 3QP	

THE ANNE ROBSON TRUST
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31ST DECEMBER 2022

The trustees present their report with the financial statements of the charity for the year ended 31st December 2022. The trustees have adopted the provisions of 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 1 January 2019).

Objectives and activities

Objectives and aims

The need to support and empower people who are dying has never been greater. Almost 700,000 people die every year in the UK, a figure set to rise to 750,000 by 2030. In a recent survey, over 70% of people questioned said they fear being helpless and dependent more than they fear death itself.

The Anne Robson Trust vision is to ensure every person receives the compassion, comfort, and companionship they wish for at the end of their life.

Significant activities

The Anne Robson Trust is a UK charity dedicated to providing emotional support to people who are dying, and those caring for them - no-one deserves to face death alone. Too many people spend their last days in a hospital ward, frightened and alone. Covid-19 has made things worse, accelerating the death rate and isolating people further.

We partner with acute hospitals to help them set up volunteer teams to work alongside palliative care and nursing staff. These volunteers provide company and companionship to patients who are dying in hospital. The dying person's loved ones often struggle to come to terms with the situation and need a large amount of support themselves.

Many organisations offer support for those who are bereaved but there is virtually nothing available for those who anticipate a bereavement. To address this, we also work in the wider community, and our national support service provides somewhere to turn to for anyone approaching the end of their life, and their family, friends, carers, or colleagues.

Public benefit

The charity and trustees believe that no one deserves to die alone. They believe that everyone deserves to have the comfort and companionship of another human being as they die, and the support to prepare for the end of their life.

THE ANNE ROBSON TRUST
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31ST DECEMBER 2022

Achievement and performance

Charitable activities

1. Expanding services to additional hospital sites: By the end of the year, we were working with 5 acute NHS Trusts with a further 5 having completed their recruitment and entered into the planning stages of setting up the project, and 9 more working to secure funding.

Hospital partners with active teams of volunteers in 2022:

1. The Princess Alexandra Hospital NHS Trust
2. The Norfolk & Norwich University Hospital NHS Foundation Trust
3. James Paget University Hospital
4. University Hospitals Birmingham - Good Hope
5. West Middlesex University Hospital - Hounslow

Hospital partners working to recruit teams of volunteers in 2023:

6. Rotherham NHS Foundation Trust
7. Maidstone & Tunbridge Wells NHS Trust
8. London North West University Healthcare
9. Milton Keynes University Hospital
10. Royal Cornwall Hospitals Trust

2. Supporting more people in hospitals

During 2022 (increase compared with 2021 in brackets), volunteers supported 1,926 (+900) hospital patients and 2,302 friends and family (+1,699*), on 4,756 visits (+2,601).

*data began August 2021

We have received universally positive and moving feedback on the value of our services.

"The Anne Robson Trust helps restore dignity, so people can experience a 'good death.' They are the catalyst that helps families normalise the turbulent emotional rollercoaster of grief. Before working with the Charity, too many patients at our hospital were dying alone, and their families simply had nowhere to go. Now we are rated 'outstanding' for end of life care - an improvement in large part thanks to our partnership with the Anne Robson Trust."

Professor Nancy Fontaine - Chief Nurse at NNUH, and Patron of the Anne Robson Trust

3. Adjusting our telephone support services

We broadened the scope of our Helpline service so it can now receive referrals from health professionals.

During 2022, we supported 212 people. The positive impact of these calls is likely to extend well beyond the caller to their family and friends.

"I called the helpline when I felt I had no one else to talk to when my partner was diagnosed with a terminal illness. It was a relief to speak to someone who understood the shock I was experiencing, and they allowed me the space and time to talk through my feelings." - Helpline Caller

THE ANNE ROBSON TRUST
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31ST DECEMBER 2022

Financial review

Financial position

The Trust's financial position continues to be robust despite the significant challenges facing the charity sector. Through a combination of careful management of expenses, effective fundraising and streamlining of services, the Trust has maintained a positive cash position, fully able to resource all charitable objectives as well as operational overheads, while retaining an appropriate level of reserves. The success of this approach will facilitate the continued planned expansion of the Trust's charitable activities with enhanced operational efficiency.

Through the generosity of supporters, we have increased our income from £219,702 in 2021 to £337,570 in 2022. The charity's expenditure rose from £233,717 in 2021 to £311,584 in 2022.

Reserves policy

The Trust's reserves policy focuses on the level of free reserves, defined as net assets excluding restricted funds and designated funds.

It is the policy of the charity to maintain sufficient funds to cover all agreed future commitments and at a level which considers inflationary fluctuation. The trustees take a risk-based approach to reserves and therefore aim to retain sufficient free reserves to meet working capital requirements and manage the risks that the charity is exposed to in the course of its business.

Trustees aim to retain four to eight months of planned unrestricted expenditure as free reserves, recognising the unpredictable nature of many of the funding sources. At 31st December 2022, the charity held funds of £145,137 of which £10,508 were restricted and £134,629 were unrestricted general reserves.

Future plans

- Service enhancement visits to our NHS Trust Partners will be piloted and rolled out during 2023.
- Projects to increase our presence in the local community.
- Continue to diversify our sources of income.
- Invest in business development to help us find new ways to deliver on our mission.
- Launch a new intern initiative to help add skills to our team and provide opportunities to university students.
- Significantly increase our impact whilst delivering improved operational efficiency.

Structure, governance and management

Governing document

The charity is controlled by its governing document, a deed of trust and constitutes an unincorporated charity.

THE ANNE ROBSON TRUST
REPORT OF THE TRUSTEES
FOR THE YEAR ENDED 31ST DECEMBER 2022

Structure, governance and management

Recruitment and appointment of new trustees

In accordance with the governing document:

There must be at least 3 trustees. Apart from the first trustees, every trustee must be appointed for a term of 2 years by a resolution of the trustees passed at a special meeting;

In selecting individuals for appointment as trustees, the trustees must have regard to skills, knowledge and experience needed for the effective administration of the charity;

The trustees must keep a record of the name and address and dates of appointment, re-appointment and retirement of each trustee;

The trustees must make available to each new trustee, on his or her first appointment both a copy of the deed of trust and any amendments made to it and a copy of the charity's latest report and statement of accounts; and

The trustees shall agree at the special meeting the length of office held by each individual trustee.

Approved by order of the board of trustees on23rd October 2023..... and signed on its behalf by:



.....
R P Cotton - Trustee

**INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF
THE ANNE ROBSON TRUST**

Independent examiner's report to the trustees of The Anne Robson Trust

I report to the charity trustees on my examination of the accounts of The Anne Robson Trust (the Trust) for the year ended 31st December 2022.

Responsibilities and basis of report

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 Act and in carrying out my examination I have followed all applicable Directions given by the Charity Commission under Section 145(5)(b) of the Act.

Independent examiner's statement

Since your charity's gross income exceeded £250,000 your examiner must be a member of a listed body. I can confirm that I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

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

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

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



J E Fox ACA

Menzies LLP
Richmond House
Walkern Road
Stevenage
Hertfordshire
SG1 3QP

23rd October 2023

Date:

THE ANNE ROBSON TRUST

STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 31ST DECEMBER 2022

	Notes	Unrestricted fund £	Restricted funds £	2022 Total funds £	2021 Total funds £
INCOME AND ENDOWMENTS FROM					
Donations and legacies	3	<u>300,653</u>	<u>36,917</u>	<u>337,570</u>	<u>219,702</u>
EXPENDITURE ON					
Raising funds		46,395	-	46,395	29,237
Charitable activities	4				
General expenditure		<u>209,398</u>	<u>55,791</u>	<u>265,189</u>	<u>204,480</u>
Total		<u>255,793</u>	<u>55,791</u>	<u>311,584</u>	<u>233,717</u>
NET INCOME/(EXPENDITURE)		44,860	(18,874)	25,986	(14,015)
RECONCILIATION OF FUNDS					
Total funds brought forward		90,275	28,876	119,151	133,166
TOTAL FUNDS CARRIED FORWARD		<u>135,135</u>	<u>10,002</u>	<u>145,137</u>	<u>119,151</u>

The notes form part of these financial statements

THE ANNE ROBSON TRUST

STATEMENT OF FINANCIAL POSITION
31ST DECEMBER 2022

	Notes	Unrestricted fund £	Restricted funds £	2022 Total funds £	2021 Total funds £
FIXED ASSETS					
Tangible assets	8	4,042	-	4,042	4,412
CURRENT ASSETS					
Debtors	9	1,565	-	1,565	1,416
Cash at bank		138,319	10,002	148,321	121,946
		<u>139,884</u>	<u>10,002</u>	<u>149,886</u>	<u>123,362</u>
CREDITORS					
Amounts falling due within one year	10	(8,791)	-	(8,791)	(8,623)
NET CURRENT ASSETS		<u>131,093</u>	<u>10,002</u>	<u>141,095</u>	<u>114,739</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>135,135</u>	<u>10,002</u>	<u>145,137</u>	<u>119,151</u>
NET ASSETS		<u>135,135</u>	<u>10,002</u>	<u>145,137</u>	<u>119,151</u>
FUNDS	11				
Unrestricted funds				135,135	90,275
Restricted funds				10,002	28,876
TOTAL FUNDS				<u>145,137</u>	<u>119,151</u>

The financial statements were approved by the Board of Trustees and authorised for issue on 24/10/2023 and were signed on its behalf by:



R P Cotton - Trustee

The notes form part of these financial statements

NOTES TO THE FINANCIAL STATEMENTS
FOR THE YEAR ENDED 31ST DECEMBER 2022

1. STATUTORY INFORMATION

The Anne Robson Trust is an unincorporated charity registered in England and Wales. The charity registration number, together with the principal address, can be found within the reference and administrative details on page 1.

2. ACCOUNTING POLICIES

Basis of preparing the financial statements

The financial statements of the charity, which is a public benefit entity under FRS 102, have been prepared in accordance with the Charities SORP (FRS 102) '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 1 January 2019)', Financial Reporting Standard 102 'The Financial Reporting Standard applicable in the UK and Republic of Ireland' and the Charities Act 2011. The financial statements have been prepared under the historical cost convention.

Going concern

The financial statements have been prepared on a going concern basis.

Critical accounting estimates and judgements

No significant judgements or estimates have had to be made by the trustees in preparing these financial statements.

Income

All income is recognised in the Statement of Financial Activities once the charity has entitlement to the funds, it is probable that the income will be received and the amount can be measured reliably.

Expenditure

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the charity to that expenditure, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all cost related to the category. Where costs cannot be directly attributed to particular headings they have been allocated to activities on a basis consistent with the use of resources.

Tangible fixed assets

Depreciation is provided at the following annual rates in order to write off each asset over its estimated useful life.

Computer equipment - 25% on cost

Taxation

The charity is exempt from tax on its charitable activities.

Fund accounting

Unrestricted funds can be used in accordance with the charitable objectives at the discretion of the trustees.

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31ST DECEMBER 2022

2. ACCOUNTING POLICIES - continued

Fund accounting

Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes.

Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

3. DONATIONS AND LEGACIES

	2022	2021
	£	£
Individual and In Memory Donations	29,796	12,972
Trust and Foundations	307,774	206,730
	<u>337,570</u>	<u>219,702</u>

Included in Trusts & Foundations is support received from, but not exclusive to: The Follett Trust, The National Lottery Community Fund, Charities Aid Foundation, Garfield Weston Foundation, The National Lottery Awards 4 All Fund, The Alborada Trust, The Linder Foundation, The Rank Foundation and Canter Holland.

4. EXPENDITURE

	2022	2021
	£	£
Staff costs	227,048	145,173
Fundraising consultancy	14,305	9,540
Bank charges	206	166
Insurance	1,290	1,189
IT and marketing	6,883	17,817
Office expenses	22,836	14,068
Staff recruitment	14,208	2,162
Rent and rates	12,139	15,728
PR expenses	3,639	5,525
Professional fees	6,826	20,674
Depreciation	2,204	1,675
	<u>311,584</u>	<u>233,717</u>

THE ANNE ROBSON TRUST

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31ST DECEMBER 2022

5. TRUSTEES' REMUNERATION AND BENEFITS

There were no trustees' remuneration or other benefits for the year ended 31st December 2022 nor for the year ended 31st December 2021.

Trustees' expenses

There were no trustees' expenses paid for the year ended 31st December 2022 nor for the year ended 31st December 2021.

6. STAFF COSTS

The average number of employees in the period ended 31st December 2022 was 7 (2021: 5).

7. COMPARATIVES FOR THE STATEMENT OF FINANCIAL ACTIVITIES

	Unrestricted fund £	Restricted funds £	Total funds £
INCOME AND ENDOWMENTS FROM			
Donations and legacies	106,202	113,500	219,702
EXPENDITURE ON			
Raising funds	29,237	-	29,237
Charitable activities			
General expenditure	105,699	98,781	204,480
Total	134,936	98,781	233,717
NET INCOME/(EXPENDITURE)	(28,734)	14,719	(14,015)
RECONCILIATION OF FUNDS			
Total funds brought forward	119,009	14,157	133,166
TOTAL FUNDS CARRIED FORWARD	90,275	28,876	119,151

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31ST DECEMBER 2022

8. TANGIBLE FIXED ASSETS

	Computer equipment £
Cost	
At 1st January 2022	7,487
Additions	1,834
	<u>9,321</u>
At 31st December 2022	
Depreciation	
At 1st January 2022	3,075
Charge for year	2,204
	<u>5,279</u>
At 31st December 2022	
Net book value	
At 31st December 2022	4,042
	<u>4,412</u>
At 31st December 2021	<u>4,412</u>

9. DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2022	2021
	£	£
Other debtors	803	726
Prepayments and accrued income	762	690
	<u>1,565</u>	<u>1,416</u>
	<u>1,565</u>	<u>1,416</u>

THE ANNE ROBSON TRUST

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31ST DECEMBER 2022

10. CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2022	2021
	£	£
Trade creditors	-	7,173
Taxation and social security	6,982	-
Other creditors	1,809	1,450
	<u>8,791</u>	<u>8,623</u>

11. MOVEMENT IN FUNDS

	At 1.1.22	Net movement in funds	At 31.12.22
	£	£	£
Unrestricted funds			
General fund	90,275	44,860	135,135
Restricted funds			
National Lottery Reaching Communities	18,376	(8,374)	10,002
Canter Holland	500	(500)	-
The National Lottery - Awards for All	10,000	(10,000)	-
	<u>28,876</u>	<u>(18,874)</u>	<u>10,002</u>
TOTAL FUNDS	<u>119,151</u>	<u>25,986</u>	<u>145,137</u>

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31ST DECEMBER 2022

11. MOVEMENT IN FUNDS - continued

Net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	300,653	(255,793)	44,860
Restricted funds			
National Lottery Reaching Communities	16,500	(24,874)	(8,374)
Canter Holland	-	(500)	(500)
BUPA Foundation	4,688	(4,688)	-
The National Lottery - Awards for All	-	(10,000)	(10,000)
The Ann Jane Green's Trust	500	(500)	-
Albert Hunt	2,000	(2,000)	-
Bernard Sunley Foundation	5,000	(5,000)	-
Hospital Saturday Fund & London Catalyst	8,229	(8,229)	-
	<u>36,917</u>	<u>(55,791)</u>	<u>(18,874)</u>
TOTAL FUNDS	<u><u>337,570</u></u>	<u><u>(311,584)</u></u>	<u><u>25,986</u></u>

Comparatives for movement in funds

	At 1.1.21 £	Net movement in funds £	At 31.12.21 £
Unrestricted funds			
General fund	119,009	(28,734)	90,275
Restricted funds			
National Lottery Reaching Communities	14,157	14,219	28,376
Canter Holland	-	500	500
	<u>14,157</u>	<u>14,719</u>	<u>28,876</u>
TOTAL FUNDS	<u><u>133,166</u></u>	<u><u>(14,015)</u></u>	<u><u>119,151</u></u>

THE ANNE ROBSON TRUST

NOTES TO THE FINANCIAL STATEMENTS - continued
FOR THE YEAR ENDED 31ST DECEMBER 2022

11. MOVEMENT IN FUNDS - continued

Comparative net movement in funds, included in the above are as follows:

	Incoming resources £	Resources expended £	Movement in funds £
Unrestricted funds			
General fund	106,202	(134,936)	(28,734)
Restricted funds			
National Lottery Reaching Communities	48,000	(33,781)	14,219
Charities Aid Foundation	20,000	(20,000)	-
The Linder Foundation	20,000	(20,000)	-
The Rank Foundation	25,000	(25,000)	-
Canter Holland	500	-	500
	<u>113,500</u>	<u>(98,781)</u>	<u>14,719</u>
TOTAL FUNDS	<u>219,702</u>	<u>(233,717)</u>	<u>(14,015)</u>

12. RELATED PARTY DISCLOSURES

There were no related party transactions for the year ended 31st December 2022.