

Charity registration number 1182127

Company registration number CE016580 (England and Wales)

**THE DIANNE OXBERRY TRUST**  
**ANNUAL REPORT AND UNAUDITED FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED 31 MARCH 2022**

# THE DIANNE OXBERRY TRUST

## LEGAL AND ADMINISTRATIVE INFORMATION

---

<b>Trustees</b>	J Rosenberg
	E O'Neal
	N Thompson
	Dr S Ferguson
	I Hindle
<b>Charity number</b>	1182127
<b>Company number</b>	CE016580
<b>Principal address</b>	C/o Blue Chip Marketing
	Blackfriars House
	Parsonage
	Manchester
	M3 2JA
<b>Independent examiner</b>	C J Sugarman FCA
	Tussies Limited
	Chartered Accountants
	31 Wilmslow Road
	Cheadle
	Cheshire
	SK8 1DR

---

# THE DIANNE OXBERRY TRUST

## CONTENTS

---

	Page
Trustees' report	1 - 2
Independent examiner's report	3
Statement of financial activities	4
Balance sheet	5
Notes to the financial statements	6 - 9

---

# THE DIANNE OXBERRY TRUST

## TRUSTEES' REPORT

### FOR THE YEAR ENDED 31 MARCH 2022

---

The trustees present their annual report and financial statements for the year ended 31 March 2022.

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the charity's governing document, the Charities Act 2011 and "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

The charity's objects are:

- to raise awareness of the symptoms and issues surrounding ovarian cancer to women, including those in the highest risk groups, predominantly but not exclusively across the North West of England.
- to raise awareness within the medical and clinical professions of the importance of early detection and diagnosis of ovarian cancer.

The trustees have paid due regard to guidance published by the Charity Commission in respect of public benefit and have kept this in mind in planning its activities.

The main activity during the year was to raise awareness of ovarian cancer symptoms and educate women across the UK, particularly the North West of England.

#### Achievements and performance

The Charity continued to increase its social media presence this year with daily posts and has grown its following.

During the reported period, the Charity delivered 15 awareness-raising talks, both in person and virtual, to Soroptimist International Groups, The Federation of Women's Institute across the northwest and south of England. We also gave a virtual talk to the staff at BASF plc via its well-being programme, attracting an audience of over 200. These talks generated new donations and supporters.

We recruited and trained three volunteer ambassadors who have had ovarian cancer.

The Charity has no employed staff and relies on some freelance support and third-party fundraisers to undertake activities to raise money in aid of the Charity.

This year we had two small groups of fundraisers who participated in the Snowdon By Night climb events, raising a total of £7,896.

We are incredibly grateful to The Garfield Weston Foundation, who awarded us a £10,000 grant towards our development costs, and The Manchester Guardian Society, who awarded us £3,500 to raise awareness of symptoms of ovarian cancer, specifically to people in Greater Manchester.

In December 2021, the Charity made a Christmas Appeal on social media, sent supporters an e-newsletter and raised £5,000.

During this period, we attracted 452 new donors.

#### Financial review

As shown in the Statement of Financial Activities on page 4, net income for the year was £23,719 compared to £1,768 in the previous year. This was added to reserves which at 31 March 2022 stood at £69,444 and are held to further achieve the objects of the charity.

#### Future plans

We will consider the composition of the Board of Trustees and aim to strengthen areas that require it.

We will have a year-long branded campaign in 2022/2023 to raise awareness of the symptoms of ovarian cancer, keep the Charity's profile high within the northwest and encourage an increasing number of supporters and donors.

# THE DIANNE OXBERRY TRUST

## TRUSTEES' REPORT

**FOR THE YEAR ENDED 31 MARCH 2022**

---

### Structure, governance and management

The charity is a charitable incorporated organisation (CIO) with a corporate governing document and is managed by its trustees.

The trustees who served during the year and up to the date of signature of the financial statements were:

J Rosenberg

E O'Neal

N Thompson

Dr S Ferguson

I Hindle

L Breakwell

(Resigned 20 January 2022)

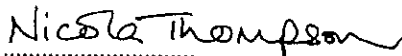
J Tod

(Resigned 21 January 2022)

The trustees are responsible for the recruitment of new trustees and their induction training.

When an opportunity arises to recruit potential trustees, the charity invites individuals to apply through the chair. The charity has a Trustee Description and Role Specification document which all candidates receive. There will be an opportunity for informal discussions. Candidates will then be shortlisted by the Chair and a small committee of serving trustees and appropriate individuals will be invited to attend the formal interview process. Successful candidates will be asked to complete necessary and appropriate training and learning development forums.

The trustees' report was approved by the Board of Trustees.



N Thompson

Trustee

Date: 25/1/2023

# THE DIANNE OXBERRY TRUST

## INDEPENDENT EXAMINER'S REPORT

### TO THE TRUSTEES OF THE DIANNE OXBERRY TRUST

---

I report to the trustees on my examination of the financial statements of The Dianne Oxberry Trust (the charity) for the year ended 31 March 2022.

#### Responsibilities and basis of report

As the trustees of the charity you are responsible for the preparation of the financial statements. You consider that an audit is not required for this year and that an independent examination is required.

Having satisfied myself that the financial statements of the charity are not required to be audited and are eligible for independent examination, I report in respect of my examination of the charity's financial statements carried out under section 145 of the Charities Act 2011 (the 2011 Act). In carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

#### Independent examiner's statement

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

- 1 accounting records were not kept in respect of the charity as required by section 130 of the 2011 Act or
- 2 the financial statements do not accord with those records; or
- 3 the financial statements do not comply with the accounting requirements of the 2011 Act or
- 4 the financial statements have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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 financial statements to be reached.



C J Sugarman FCA  
Fussies Limited  
Chartered Accountants

31 Wilmslow Road  
Cheadle  
Cheshire  
SK8 1DR

Dated: 25/1/2023

# THE DIANNE OXBERRY TRUST

## STATEMENT OF FINANCIAL ACTIVITIES INCLUDING INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 31 MARCH 2022

		Unrestricted funds 2022 £	Unrestricted funds 2021 £
	Notes		
<b>Income from:</b>			
Donations and legacies	2	48,711	17,614
<b>Expenditure on:</b>			
Raising funds	3	3,860	14,318
Charitable activities	4	21,132	1,528
<b>Total resources expended</b>		24,992	15,846
<b>Net income for the year/ Net movement in funds</b>		23,719	1,768
Fund balances at 1 April 2021		45,725	43,957
<b>Fund balances at 31 March 2022</b>		69,444	45,725

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

# THE DIANNE OXBERRY TRUST

## BALANCE SHEET

AS AT 31 MARCH 2022

	Notes	2022 £	£	2021 £	£
<b>Current assets</b>					
Debtors	8	-		678	
Cash at bank and in hand		71,514		46,872	
		<u>71,514</u>		<u>47,550</u>	
<b>Creditors: amounts falling due within one year</b>	9	(2,070)		(1,825)	
<b>Net current assets</b>			69,444		45,725
<b>Income funds</b>					
Unrestricted funds			69,444		45,725
			<u>69,444</u>		<u>45,725</u>

The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 March 2022.

The trustees acknowledge their responsibilities for complying with the requirements of section 130 of the Charities Act 2011 with respect to accounting records and the preparation of financial statements.

The trustees consider that the charity is entitled to exemption from the requirement to have an audit under section 144 of the Charities Act 2011 and that members have not required the charity to obtain an audit.

The financial statements were approved by the Trustees on 25/1/2023

Nicola Thompson

N Thompson

Trustee

Company registration number CE016580



# THE DIANNE OXBERRY TRUST

## NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 31 MARCH 2022

### 1 Accounting policies

#### Charity information

The Dianne Oxberry Trust is a registered charity in England and Wales and is a charitable incorporated organisation. The address of its principal office is c/o Blue Chip Marketing, Blackfriars House, The Parsonage, Manchester M3 2JA.

#### 1.1 Accounting convention

The financial statements have been prepared in accordance with the charity's governing document, the Charities Act 2011 and the Charities SORP "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).

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

#### 1.2 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of their charitable objectives.

#### 1.3 Income

Income is recognised when the charity is legally entitled to it after any performance conditions have been met, it is probable that the income will be received and the amount can be measured reliably.

#### 1.4 Expenditure

Expenditure is recognised once there is a legal or constructive obligation to transfer economic benefit to a third party, 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 is classified by activity. The costs of each activity are made up of the total of direct costs and shared costs, including support costs involved in undertaking each activity. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs which contribute to more than one activity and support costs which are not attributable to a single activity are apportioned between those activities on a basis consistent with the use of resources.

#### 1.5 Taxation

The charity is exempt from tax on its charitable activities.

### 2 Donations and legacies

	Unrestricted funds	Unrestricted funds
	2022	2021
	£	£
Donations and gifts	48,711	17,614

# THE DIANNE OXBERRY TRUST

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

### 3 Raising funds

	Unrestricted funds	Unrestricted funds
	2022	2021
	£	£
<u>Fundraising and publicity</u>		
Seeking donations, grants and legacies	1,480	(4,307)
Other fundraising costs	870	50
Support costs	1,510	18,575
	<u>3,860</u>	<u>14,318</u>
Fundraising and publicity	<u>3,860</u>	<u>14,318</u>
	<u>3,860</u>	<u>14,318</u>

The credit in respect of fundraising costs in 2021 arose following the cancellation of the Manchester 10k Run due to the Covid pandemic. Entrance fees paid in the previous year were refunded by the organisers.

### 4 Charitable activities

	Grant making activities	Grant making activities
	2022	2021
	£	£
Share of support costs (see note 5)	20,028	502
Share of governance costs (see note 5)	1,104	1,026
	<u>21,132</u>	<u>1,528</u>

# THE DIANNE OXBERRY TRUST

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 MARCH 2022

### 5 Support costs

	Support costs	Governance costs	2022 Support costs	Governance costs	2021
	£	£	£	£	£
Postage and stationery	598	-	598	368	368
Sundry expenses	79	-	79	135	135
Website costs	346	-	346	4,516	4,516
CRM and online platform costs	1,510	-	1,510	1,638	1,638
Other IT costs	331	-	331	248	248
Communications and social media	2,995	-	2,995	688	688
Operations management	15,679	-	15,679	11,484	11,484
Independent examiner's fees	-	300	300	-	300
Insurance	-	678	678	-	726
Trustee meetings	-	126	126	-	-
	<u>21,538</u>	<u>1,104</u>	<u>22,642</u>	<u>19,077</u>	<u>20,103</u>
Analysed between					
Fundraising	1,510	-	1,510	18,575	18,575
Charitable activities	20,028	1,104	21,132	502	1,528
	<u>21,538</u>	<u>1,104</u>	<u>22,642</u>	<u>19,077</u>	<u>20,103</u>

### 6 Trustees

None of the trustees (or any persons connected with them) received any remuneration or benefits from the charity during the year.

### 7 Employees

The charity had no employees during the year (2021: None).

### 8 Debtors

	2022	2021
	£	£
Amounts falling due within one year:		
Prepayments and accrued income	-	678

### 9 Creditors: amounts falling due within one year

	2022	2021
	£	£
Accruals and deferred income	2,070	1,825

# **THE DIANNE OXBERRY TRUST**

## **NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)** ***FOR THE YEAR ENDED 31 MARCH 2022***

---

### **10 Related party transactions**

There were no disclosable related party transactions during the year (2021 - none).