

Supporting Oxford Health NHS Foundation Trust to enhance the experience of patients, carers and staff



Oxford Health Charity
Annual Report
2021/2022





Page Number

Welcome	2
Our Mission	3
Our Strategy	4-8
Financial Snapshot	9
Our Current Appeals	10-11
Remembering George Hedges	12-13
Highlights of the Year and Oxford Health Charity heroes	14-26
Future Plans	27-28
Help us to help our Communities	29
Accounts	
Foreword	30
Introduction	32
Objectives and Activities	32
Achievements and Financial Review	33
Investment Policy	34
Governance	35-36
Structure and Management	37-38
Public Benefit	38
Consolidation of Accounts	39
Partnership Working	39
Reserves Policy	39
Going Concern	41
Risk Management	41
Statement of Trustee's Responsibilities	42
Independent Examiner's Report	43-44
Statement of Financial Activities	45-46
Balance Sheet	47
Notes to the Accounts	48-63

Welcome



Welcome to our annual report for 2021/22 which encompasses the required financial reporting as well as the human side of charity – detailing the impact of charity funded projects, fundraising endeavours and appeals.

As ever, it is an important part of our work that charity funding spans the wide geography and scope of services within Oxford Health NHS Foundation Trust, and this report highlights projects from across the region that have been supported during the year.

The impact of COVID has continued to be felt throughout the Trust and projects to support wellbeing – of patients, carers and staff – have been at the forefront of our work. Thanks for the donations that make this possible again goes to donors who have given to umbrella charity, NHS Charities Together, as well as our own amazing fundraisers and donors, this national and local support has been a heartwarming positive in the most difficult times.

Your support – whether financial, social or physical – is truly appreciated and makes a difference everyday.

Oxford Health Charity



Our Mission

Our mission at Oxford Health Charity is to enhance the experience of patients, carers, families and staff involved with the services of Oxford Health NHS Foundation Trust.

The Trust delivers physical, mental health and social care for people of all ages across Oxfordshire, Buckinghamshire, Swindon, Wiltshire, Bath and North East Somerset. Our services are delivered at community bases, hospitals, clinics and in people's homes. The Charity supports all these services over and above NHS funding.

Our Strategy

The main focus of the 2019-22 Oxford Health Charity Strategy is to increase the positive impact the charity can have on supporting patients, carers and staff within Oxford Health NHS Foundation Trust. The strategy was developed in 2019 through a series of consultation workshops with key stakeholders and was described in those as the start of a journey to achieving a successful, impactful and celebrated charity. As the strategy came to a close in 2022, a full review of the last three years has taken place and, despite a sometimes difficult road thanks to the COVID-19 pandemic, the journey that the charity has been on has seen a host of positive achievements and changes which have led to more patient, carer and staff support than would have been considered possible in 2019. The winding road of this journey has been perfectly illustrated in this image and the trees on the subsequent pages – meeting our aim to make the charity journey accessible to as many of our community as possible.



2

Enabling efficient and effective expenditure



The way in which individuals and teams across the Trust can access funds has a direct impact on the breadth of projects that can be supported and, ultimately, the enhancements to patient experience that can be made.

Work has been ongoing throughout this period to make all processes more efficient and effective with a move to online request forms coinciding with the pandemic and enabling a smooth transition to new ways of working. The online forms are now used almost exclusively and increased numbers of requests for funding have been received year on year.

An online approach has also been taken for two 'dragon's den' style events which have widened the impact of charity funds across innovative patient-centred projects across the Trust.

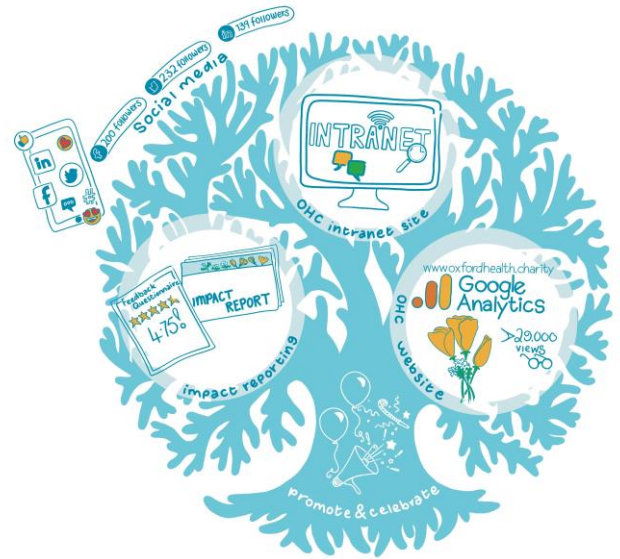
Charitable funds held in investments have been the focus of both ethical and risk reviews during the strategy period, with a strong ethical policy agreed by the Charity Committee in 2021. The Committee has also undertaken a full review of all funds held within the charity and are particularly thankful to our committee's external member for the archive review which highlighted key learning points for future management of legacies. The number of funds in total has increased but the majority of those added in the strategy period have been restricted or specifically linked to grants from NHS Charities Together.

3 Promotion and celebration of Oxford Health Charity

Increasing awareness of the charity, the projects that it supports and the impact these have on patients, carers and staff is absolutely vital to the ongoing growth of charitable donations and engagement.

This area of work was initiated by the launch of the charity website in late 2018 and has been further boosted by the introduction of social media profiles on Facebook, Twitter and Linked In. Both approaches have seen increasing engagement throughout the strategy timeframe with website traffic almost doubling from the beginning of the period to the end and all social media channels being followed by between 185 and 250 individuals or companies. Internal promotion has also increased with a regular charity page within the weekly Bulletin and stories highlighting case studies shared with team meetings and the Board.

In addition to traditional communication methods, the charity has also introduced t-shirts for volunteers supporting charity related projects and branded signage for equipment purchased through charitable funds. The increase in requests, support and advocacy for the charity is in direct correlation to the increase in positive promotion and celebration of charity projects.



4

To increase resources in support of Oxford Health Charity



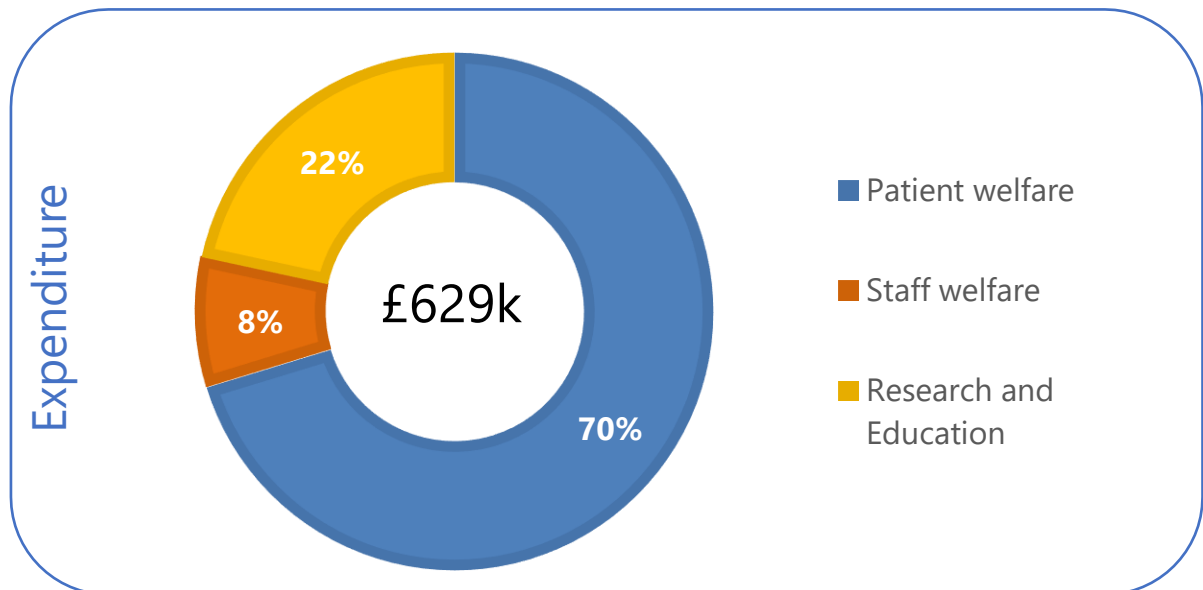
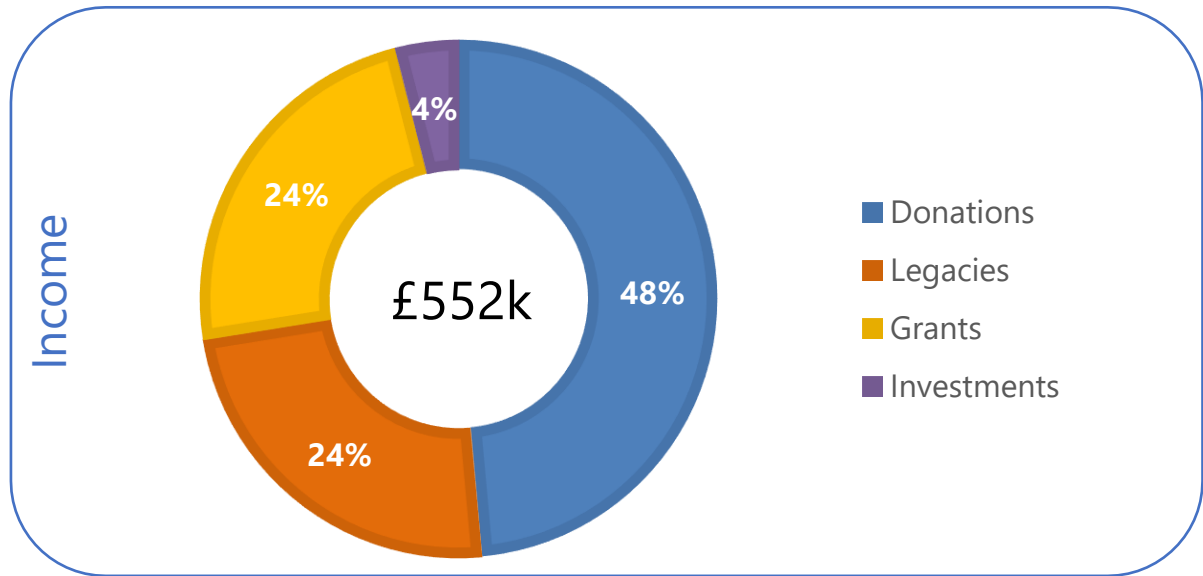
At the beginning of the strategy period, the charity resources consisted of a percentage of the time of the Head of Charity and Involvement and the contracted finance management support. To enable the charity to grow and meet the ambitions of this strategy, a business case was approved to introduce a Development Manager with responsibility for fund request support, fundraising developments and promotion. The Development Manager started just prior to the first lockdown in 2020 and has been an essential addition to the charity – enabling significant growth and implementing new support structures during a difficult period.

In addition, new volunteering roles have been implemented both to support the charity functions and also wider charity funded projects. The charity has also benefitted from increased engagement from service leads in their roles as fund advisors and the Charity Committee members. The Charity Committee has encouraged more operational attendance by splitting its quarterly meetings into governance and development agendas, allowing operational engagement with impact reports and requests for the higher levels of funding.

Next Strategic Steps

Consultation, benchmarking and research is currently underway to ensure that the next strategy meets the ambition and drive needed to continue to grow Oxford Health Charity for the future. It is anticipated that this strategy will see further growth in resources alongside focussed objectives to support outstanding care, people, environments and innovation.

Financial Snapshot



Our Current Appeals



Where the Need is Greatest



Oxford Health Cares

Supporting staff wellbeing



In Memory

Making a donation in memory of a loved one is a very personal way of supporting the team, ward or service that supported them in their time of need



Respite for Oxfordshire's Sick Youngsters (ROSY)

Supporting families by providing respite care to young people with life limiting illnesses



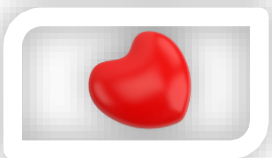
Oxford Health Arts

Delivering projects and activities engaging those receiving care in expressing themselves through the arts



Green Spaces

Bringing our outdoor spaces to life, making a positive difference for our patients, staff and visitors



Service Specific Appeals

Supporting specific services across the Trust including Community Hospitals and Services; Buckinghamshire Mental Health and Oxfordshire and West Mental Health services

Appeals to look out for in 2022 and beyond



PICU (Psychiatric Intensive Care Unit)

A new PICU is being developed at the Warneford Hospital in Oxford. Our new PICU appeal focuses on four enhancements

- Gym – a garden exercise room
- Sensory room – a bespoke sensory space
- Art – unique pieces created to compliment the services provided
- Garden – establish safe and engaging green spaces



Lucy's Room

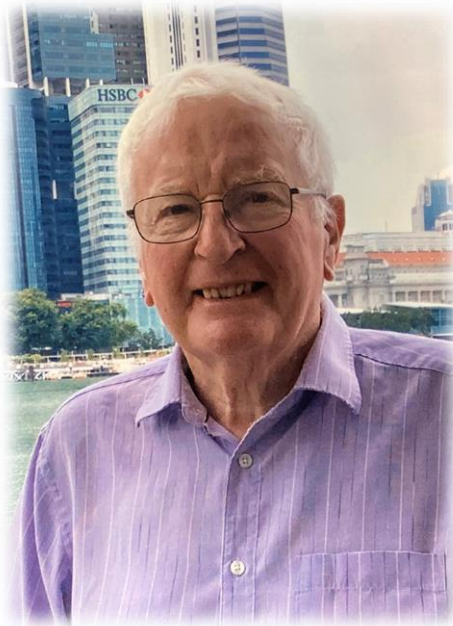
Lucy's Room is an appeal started by Lucy's family following her death in 2017. The aim of the appeal stems from Lucy's previous use of the music room in the Highfield Unit (a Child and Adolescent Mental Health Unit) which she was unable to access once she moved into Adult Mental Health Wards and community support. The development of Lucy's Room will mean that those receiving care on the ward or through the community mental health teams will have a space where they can make music, play music and receive music therapy sessions.

After five years of fundraising the music room building works began in 2022.



Remembering George Hedges

It is with great sadness that we mark the passing of one of the ROSY family. The ROSY (Respite for Oxfordshire's Sick Youngsters) fund is a vital part of the Oxford Health Charity and has been running for the last 20 years to provide funding for respite care to families with children with severe and life limiting illnesses. George Hedges was at the centre of ROSY – he was a fundraiser, an advocate, a friend, a passionate speaker, an organiser and a support to all those involved with ROSY and he will be sadly missed.



George and the rest of the ROSY team – all volunteers bar one – regularly raise over £250,000 a year to ensure the respite services continue to be available for those families who need it most. But alongside this tireless fundraising, George also offered a personal support to families through hosting (with his wife) coffee mornings, curry nights, parties, events and more. He was always present at the big fundraising events of the year – whether that was the Stately Car Boot sale that ran for many years at Cornbury or the annual ROSY walk – and championed ROSY at talks and events across the county to raise funds. He was a keen advocate for the families and met with the Oxford Health team regularly to ensure they were getting the support they needed, that respite hours were being given to those most in need and, ever caring, that the nurses and staff were also being supported as they needed.

George is remembered fondly by so many and he has left a lasting legacy in the respite care provided.

George, always quick to respond and happy to help, going above and beyond for families in need. Friendly, approachable, chatty and kind. A pleasure to work with and such a modest wonderful man.

He helped my son by funding an electronic robot for school so that he could continue with his schooling from home.

George also organised many other activities and fun days catering for all of the specialist needs of the children. The children were always at the centre of everything he did. He will be missed greatly by many families as well as the members of the Rosy team, and of course a lot of the sponsors who generously donated to the charity.

I look back fondly at the monthly coffee mornings, held in turn at each of the committee member's houses including my own, when parents could share their stories, children and siblings could play and the room was filled with laughter ... I cannot tell you what a privilege it is to have known George. He set a shining example to all who knew him, he was good to the core of his soul, he gave and he gave and he gave, caring deeply about every single person he knew.

He had a heart of gold, nothing was ever too much to ask, if he couldn't make it himself he would get someone else to make it or get funding to buy it.

He was always an active leader at the big fundraising events of the year – whether that was the Stately Car Boot sale that ran for many years at Cornbury or the annual ROSY walk – and championed ROSY at talks and events across the county to raise funds.

George made me feel welcome when I joined the Oxford Health Charity and left me in awe of his ability to fundraise even at the most difficult times. He persevered even when unwell himself and always had the ROSY families in the forefront of his thoughts.

"He got it" He understood what families go through with disabled or poorly children ... We as a family will whole heartedly miss George, he will always have a place in our hearts.

I always remember him recounting the story of the Yorkshire Ripper in many meetings much to everyone's astonishment as occasionally it came out of the blue and appeared quite unrelated to the matter in hand!

As the Executive Lead for the Charity, I was fortunate to meet George very early on in my appointment to Oxford Health FT. He was always constructively challenging in his quest to get the best for the families he cared passionately about and that challenge I believe led us together to foster strong relations between ROSY and the hospital charity. He became a great colleague and I admired very much his dedication to helping others as well as his wicked sense of humour which I will miss greatly.



Highlights of the Year

We supported a series of art workshops organised by Oxford Health Arts Partnership inviting staff members to create a piece of artwork based on their experiences of the Covid pandemic.

Alongside local artists, the participants took part in a series of wellbeing enhancing creative activities. They were able to express in words and picture their experiences in a creative environment.

The workshops were well received by everyone that took part; one staff member said "I came to the workshops a little unsure. I think this was mainly because of the time commitment. However, by the time of the last meeting I found myself really looking forward to it and felt so disappointed they were ending!"



April 2021

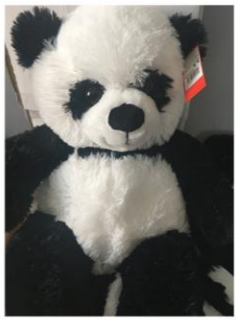


We were grateful to the local supermarkets near to the Fiennes Centre in Banbury, who donated Easter Eggs for the team



We purchased two brightly coloured armchairs and a table for the visitors waiting area at Wallingford Community Hospital.

This has been a great asset to the building and is used constantly during the day by visitors who are waiting to go onto the ward, its added a real pop of colour to the corridor and really brightens the place up aswell. The table has a leaflet holder so that the latest copy of the charity newsletter and other information can be read by visitors.



We received a lovely and quite random donation of panda teddy bears from a local supermarket! These were passed on to our Family Nurse Partnership who gratefully distributed onto some of the young families they work with.



We were excited to welcome back the talented musicians from Orchestra of St John's across the forensic services wards at Littlemore Mental Health Centre in Oxford. Our funding enabled a 30 minute mini outdoor concert to be performed each week. Staff and patients enjoyed a diverse range of genre and instruments including classical, jazz and film music; and instruments range from harp to clarinet.

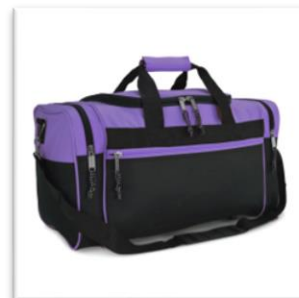
Over the last 18 months musicians have not been able to perform very much, if at all, in front of a live audience. For many of them this has been a hard period and the project gives them an opportunity to engage with people again doing what they love. You can see that the musicians enjoy performing for people, it energises them, and this gets passed on to our service users.



We provided the newly formed Dialectical Behaviour Therapy team in Buckinghamshire with a DBT Skills training handout and worksheets book to give out to their service-users. Prior to charity funding material adhoc sheets were printed out.

Being able to supply our clients with their own workbook, gives a more professional feel to the service, increase accessibility to their therapy handouts and worksheets and save on admin time. Thank you!

On occasions patients arrive at our mental health inpatient units with their belongings in a bin bag. To help maintain dignity, we purchased some duffle bags for patients to use when they leave our inpatient units to take their belongings home in.



A familiar visit to the local can now be enjoyed by the gentlemen on Sandford Ward, thanks to the opening of the Wyfold Social Club. The male patients, who are over 65 and are experiencing severe mental health and/or dementia, are now able to enjoy a space to relax and get together in comfortable and safe surroundings reminiscent of a social club, within the ward at Fulbrook Centre, Churchill Hospital in Oxford.

This was made possible thanks to a generous donation from Wyfold Charitable Trust made to Oxford Health Charity. The Sandford Ward staff were keen to recognise this, hence the name the 'Wyfold Social Club'.

Patients are able to enjoy this space with pub-like furniture and furnishings including blackboards, posters and signage and the pub games such as cards, dominoes and a (magnetic) dart board. Also (plastic) tankards, and cocktail shakers to enjoy a (non-alcoholic) beverage alongside a packet of pork scratchings! But the most popular piece seems to be the juke box enabling the gentlemen to select and enjoy music of their choice. Sandra Diesel, Activity Coordinator on Sandford Ward explained



The team felt that a social club would be a meaningful addition to the ward to spend time with the patients in a relaxed and familiar environment. From our Grand Opening it was noticeable how everyone felt more at ease and conversations were free-flowing. We are all looking forward to regularly being able to use the new Wyfold Social Club

Members of the 1 Regiment 23 squadron took on a 440km static bike challenge in under 12 hours to raise money for their local community hospital in Bicester.

As part of the society, we are extending our support to our Bicester local community hospital for their time and effort they have given to help those in need, especially in covid times when the whole country was suffering.



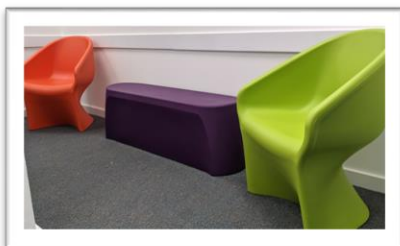
We joined in the national NHS Big Tea celebrations and encouraged Oxford Health NHS FT teams to take a break and enjoy a cup of tea.



We provided teams with packs containing tea, coffee and biscuits. Thanks to our volunteers we could distribute to teams throughout our sites in Oxfordshire, Buckinghamshire and Wiltshire.



Patients and staff also enjoyed a series of tea parties held within Oxfordshire's community hospitals. As well as refreshments, the charity funded musicians to lift spirits.



We funded some colourful modern seating for the newly renovated CAMHS outpatients waiting area in High Wycombe.

The seating is more cheerful, welcoming and hygienic as they are easier to clean than standard seating.



Paul Stack from Chiltern Rangers took on the gruelling 100km Race to the Stones ultramarathon to raise money for our Green Spaces appeal.



We were delighted to support the City Community Learning Disabilities service with a library of Books Beyond Words. These are wordless picture stories covering topics including physical and mental health, lifestyle and relationships, abuse and trauma, grief and bereavement, employment, and criminal justice.

They provide an accessible reasonable adjustment aid to communication for a wide variety of patients including people with learning disabilities and/or autism, people with cognitive or communication difficulties, such as Dementia, people who have difficulty with reading, including some Deaf people, and people who do not use the language of the country where they are living. A valued resource for many!

Over 40 members of Oxford Health NHS FT staff and family/friends took part in an Inflatable Fun Run. Helping to relieve some of the pressures of work, build team morale all whilst fundraising for our charity.

We had a great sense of camaraderie fundraising for a cause we are passionate about!



We warmly welcomed some young people from Headington School in Oxford, who helped with some painting and gardening at City Hospital.



They also made us some beautiful bird feeders that we placed in different sites over the Trust.



Libby Pannett-Smith, an Occupational Therapist at Marlborough House in Swindon donned her lycras to take on the incredible 1000+ mile bike ride from Lands End to John O’Groats to raise funds for our charity and in particular the Positivity Pot.

Young people at our Highfield Unit in Oxford pieced together a new mosaic over the summer holidays, supported by charity funds. Local artist Becky Paton designed the mosaic based on drawings by the young people on the Unit.



Leading mosaic projects at the Highfield is always a highlight to my year... The act of mosaic making is incredibly mindful and involves great teamwork. The positive effects of these attributes are tangible within the group, which is a joy to be part of and a strong reminder that creativity is a vital part of holistic care for individuals.



This years annual **HealthFest** event focussed on staff health and wellbeing with the theme of Reflection and Recovery. All staff, volunteers and governors were encouraged to join in one (or more!) of our online sessions.

We worked to offer a variety of sessions to cater for different interests including coaching, origami, Indian cookery, seated dance, military fitness, gardening, wellbeing through art – and much more!

The most relaxing hour I've had during my working day EVER!!

loved it - so peaceful and calming

I feel enlightened and ready to take the next steps on my wellness journey

loved it, it helped my upper body pain issues

I felt empowered to begin challenging some of my negative thoughts.

Clearer appreciation of ME - and my own values and that I should place more importance on them!

Felt relaxed, full of love and peace to start the working day

Inspired to try cooking the dish demonstrated.

I want more!

The session was fun and energetic, it made me feel happy and allowed me to switch off from work for 1/2 an hour



Sisters Rachel and Hollie Dunne took on their own unique triathlon to raise funds for our community CAMHS services in Wiltshire who have cared for their niece.

We provided a series of visual aids to demonstrate anatomy and physiology clearly to urgent care patients. A series of educational posters and models were purchased to help break down barriers, reduce anxiety and improving communication to patients at the Minor Injuries Units in Henley, Abingdon and Witney and Bicester First Aid Unit.



The old visual aids were very old and worn out. These new ones are extremely helpful for both patients and staff. Patients find these really helpful in helping them understand their have injury and how this will affect them.



The Oxford Half made a welcome return in October 2021 and we had a team of 19 runners made up of staff, families and members of the public. The first time we had Oxford Health Charity branded running tops too!



We funded the AJOS Trust to deliver weekly Creative Movement to Music sessions at Cherwell and Sandford wards at The Fulbrook Centre in Oxford. These were seated dance sessions open to patients with the aim of impacting positively upon their mental health. Patients reported:

It is very relaxing and yet the exercise will invigorate you.

I learn increasingly that controlled, systematic gentle exercises can have an important role in calming external problems and am incorporating the exercises we went through today in my techniques for replacing negative feelings with positive attitudes.

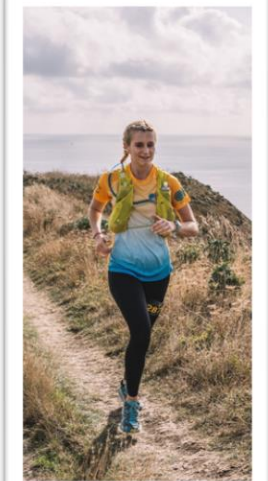


We welcomed a group of volunteers from a business based in Abingdon AECOM. Over two days the team worked wonders on our green spaces at Abingdon Community Hospital tidying, weeding, painting and fixing.

Oxford Health Charity proudly lent support of Black History Month, by funding a number of events run by the Trust's Equality Diversity and Inclusion Team. These were open to Oxford Health staff, and featured key experts sharing their knowledge and wisdom on race equality. The sessions were aimed to raise awareness, provoke thinking and essentially, lead to take action.

Previous-patient Zoe, took on an Ultramarathon around the Jurassic Coast in aid of our Oxfordshire and West Mental Health fund, and more specifically Cotswold House, Marlborough whom cared for her.

This ultra challenge is my way of properly saying 'good riddance' to anorexia, that destroyed my life (and that of my family) for nearly four years. But also a huge 'thank you' to the team at Cotswold House for believing in me, supporting me, and caring for me during the darkest moments of my eating disorder. Without them I truly believe I would not be sat here today.



We provided funding to allow a small group of the Buckinghamshire carer support group to attend (socially distanced) the Waddesdon Manor Christmas Market. This helped further develop relationships and peer support within the group.

During the December carer group meeting we also provided a Festive hamper to the winner of their quiz.



Charity funds have purchased music studio equipment for the Wenric Ward, enabling patients to pursue their interests in music, DJ-ing and recording. Historically patients on Wenric have visited the Oxford Clinic, however due to COVID restrictions this wasn't possible.

Music is often a valuable source of therapeutic engagement and personal expression for our patients. It's been wonderful to have our own equipment – five patients regularly use with support of the music tutor.

We worked with a young lady Alice who has set up her own charity creating positivity boxes.



Alice's Positivity Boxes delivered us a wonderful selection of goodies to spread festive cheer to inpatients at the Whiteleaf Centre in Aylesbury. From mindfulness activities to herbal tea bags, chocolates to card games, there was something for all.

Each Christmas we work with the Trust inpatient wards in Buckinghamshire, Oxfordshire and Wiltshire to provide funding for festive food and gifts. This ensures that all patients in the 35 inpatient wards on Christmas Day receive a gift and can share in festive treats with each other and the staff working that day too. We recognise that it is not just the inpatient wards who will be seeing patients on Christmas Day and were able to provide festive hampers to the Urgent Care units that were open to patients as well.



To spread further seasonal cheer we invited a local cabaret act Mary Lou Revue to entertain patients and staff at our community hospitals.

We funded for the Artists in Residence project which saw six professional artists of varying disciplines, take residence at our Oxfordshire community hospitals for a six-month pilot project.

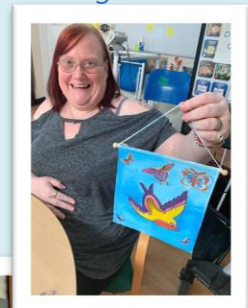
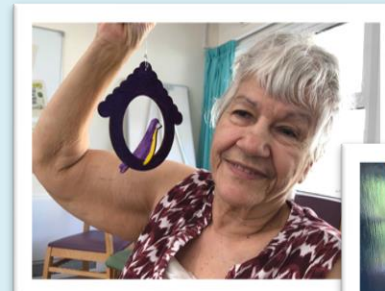
The artists brought movement and dance, painting and canvases, images and inspiration, conversation and storytelling, poetry and collage, ink, paint, paintbrushes and a shared experience.

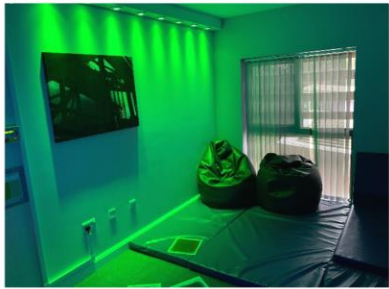
- 236 sessions took place delivered by 6 artists
- 1225 patient attendances were recorded

'Normally I'm on my own this gives me peace in my mind and body and it's uplifting I feel so much better in myself!'

'I feel like a kid again – you don't know what you can do until you try!'

'I saw the universe today while dancing it was beautiful!'





Thanks to funding from NHS Charities Together we worked with Age UK Buckinghamshire on a digital poverty support service enabling clinical teams to be able to offer a digital consultation to patients who would otherwise have been excluded through a lack of connectivity.



Through our own funding we have run a similar service in Oxfordshire with Age UK Oxfordshire.

After various fundraising initiatives over the past couple of years by the Highfield Unit, we were delighted to support the installation of a new sensory room for the young people in the Unit.

We received a lovely donation of new soaps and craft packs thanks to Help for Hoarders. These were all put to great use with soaps packaged up and passed to some of our wards. The art materials were put on our Art Carts in the Community Hospitals.



We supported Oxford Health Arts Partnership with a large arts project exploring the history of Wantage Community Hospital. OHAP worked with Artist Anne Griffiths to design a postcard which was distributed to members of the community to gather ideas and epiderma/photographs of the hospital's past. This research was co-ordinated in partnership with Vale of White Horse District Council and Vale and Downland Museum and led to the long-term loan of the 'Stitching Wantage' sampler, which was created by members of the community with the artist – the installed artwork is 2.5m long and has become a talking point for visitors to the hospital.

We provided a half day training session for staff at Luther Street Medical Practice on Personality Disorder: Positive Outcomes.

Luther Street Medical Centre is a GP Practice that provides care to the homeless and vulnerably housed within Oxford City. Services include GPs, nurses, mental health, social prescribing, addictions worker, dentistry, acupuncture and podiatry. Within the course of the work of the Practice, staff often work with challenging and complex patients. The aim of the training was to equip the team to provide the best support and care possible to patients as well as looking after our staff team.

This training was extremely useful, thought-provoking and enabled us to see things from another perspective... It has enabled much more open conversations about how a patient makes a person feel, acknowledging this and discussing tactics that could be utilized to inform better outcomes for both patients and staff.



Martin Parker, the 2021 Captain of Burford Golf Club chose our Charity as his 'Charity of the Year' to benefit from the club's fundraising for his year-long tenure.

He was keen to support the Myalgic Encephalomyelitis/ Chronic Fatigue Syndrome (ME/CFS) and Post COVID Rehabilitation Service. Rachael Rogers, Clinical Service Lead was presented with a wonderful donation.

February 2022



For Children's Mental Health Week (7-13 February) we teamed up with local craft company Rainbow Buttons to create 'Take Time to Talk' craft boxes.

These boxes were designed to encourage families to craft together and engage in conversation during the half term break.

Each box cost £20 and £5 from every sale was donated to us to support local CAMHS (Child and Adolescent Mental Health Services).



Thanks to funding from NHS Charities Together we have been able to install two wellbeing pods at Cotswold House, our Eating Disorders Unit in Marlborough.

These pods have provided much needed additional space for a wide variety of purposes including group activities, family visitors, staff break-out area and patient meetings. As patients are living with eating disorders this area also provides a space to eat and interact with food in a more relaxed environment.

It was genuinely really nice to have a space off the ward, that was outside but protected from the weather. Excited to be able to share the pods with patients as well staff

These are really good, staff have used them for breaks, meetings and supervision and 1:1 with patients. It's really nice to have an area off the unit to use

We purchased two specialist mattresses for the End of Life beds at Wallingford Community Hospital, to provide patients with additional comfort.



Patients on Cherwell Ward in Oxford have benefitted from an array of new sensory items. These are used to engage with patients with lower

functional abilities, in particular individuals with dementia and those who are highly anxious.

We have introduced these different sensory items as calming strategies for patients who are anxious and have seen a reduction in the frequency of patients becoming highly distressed. It has been easier to reassure patients with these items, and improve patient engagement in group activities.



Russell Butcher took on the Reading Half Marathon to fundraise for our forensic services fund.

Oxford Health Charity Heroes

Oxford Health Cares would not have been possible without the kindness and generosity of our supporters. Our huge thanks go to all those who supported us through fundraising, donating goods and services and volunteering their time.



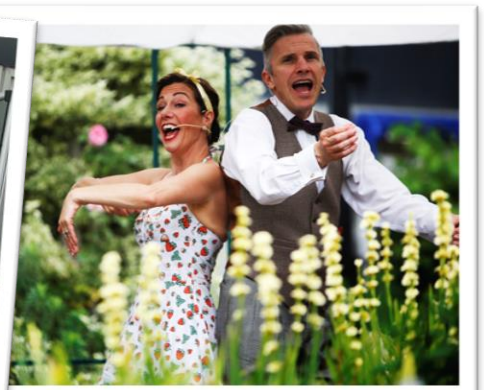
Barnados	Restore	My Life My Choice	Chiltern Rangers
NHS Charities Together	Age UK Buckinghamshire	RAW	Thomkat Designs
Age UK Oxfordshire	Unloc	Rosetta Life	AECOM
Fort Builders Merchant	Burford Golf Club		Headington School
Ornate Garden Buildings		Vale and Downland Museum	Rainbow Buttons
Liberty Garden Buildings	NHS Property Services - Savernake	Be Military Fit	The Wellbeing Girl
Dan Brain		Summertown Blues	Waitrose
St Johns Orchestra	Helping Hands for Hoarders		Life at No. 27
Becky Paton Mosaics	Estee Lauder	Dr Lizzy Burns	
	Miranda Bence-Jones	Thomkat Illustrations	Yoga with Emma
Anne-Marie Cadman	Asda	League of Friends – Abingdon, Bicester, Didcot, Townlands, Wallingford, Wantage and Witney	
Tesco Community - Abingdon			Maya's Lab
	Hilton Garden Inn Abingdon		

THANK YOU

Future Plans

Moving forward into 2022/23, Oxford Health Charity has continued to work closely with the Trust to support wellbeing for patients, carers and staff. This has seen ongoing work to support green spaces for patients and staff in both ward and general Trust spaces – especially focussed on the placement of two wellbeing garden pods at Cotswold House, Marlborough as a result of the NHS Charities Together Stage 3 grant funding, the development of garden spaces at Saffron House, Wycombe (mental health hub for adult and adolescent services) and the opening of the Littlemore Meadow Outdoor Gym – a project that was initially planned pre-pandemic.

There has also been support for team wellbeing activities, ward activities – especially the ongoing delivery and support of arts within healthcare services, and looking forward to the installation of Lucy's Room – a music space for adult mental health wards and community service users at the Warneford. The charity will also repeat the positive HealthFest experience of 2021 by providing a series of wellbeing activities for staff, volunteers, governors and partners in the Autumn/Winter with the launch during the Trust's first Gratitude Week. These projects sit alongside the normal day to day support provided to patients, carers and staff across the Trust and the year on year increase in funding requests has continued into 2022/23.



As our 2019/22 Strategy came to completion, consultation sessions, research and peer reviews are being undertaken during 2022/23 to ensure our next strategic steps forward enable continued growth, increased support for impactful projects and the development of further fundraising appeals. The future strategy will also seek to incorporate the wider ways in which patient experience can be enhanced, including volunteering, arts provision, community links and the involvement of the third sector. This will further formalise the charity involvement in the Oxford Health Arts Partnership – an area of work that enhances both the physical spaces and mental wellbeing of those receiving and giving care at the Trust – and the provision of volunteer support for projects, activities and developments across the Trust.

As the charity continues to grow, 2022/23 will also see the transition of charity finance management to an internal structure (following five years of external management by Moore Kingston Smith, and previous finance management through the Oxford University Hospital NHS Foundation Trust). In line with initial strategy consultation discussions, proposed growth in relation to fundraising, philanthropic giving and project management will also be a key area of focus and development.

Alongside increasing requests for support, there has also been an increase in larger project development requests which require fundraising appeal structures to be created. In 2022/23 these are likely to include, PICU Arts and Activities (£150,000+), Tackling Dentistry Anxiety (£60,000+), Ward Green Spaces for Wellbeing (£75,000+) and the Minor Injuries Unit Children's Area (£10,000). These will sit alongside our existing appeals and will have focussed fundraising plans in place to support their delivery.



Help us to help our communities

Everything we've been able to support, from the wildflower meadows and patient/staff gardens, the creative therapies through to the gym equipment, outdoor furniture through to sensory aids. All these activities and projects were thanks to the generosity of our supporters, for which we are truly thankful.

If you are looking to take part in a fundraising activity or challenge yourself and would like to support your local community hospital or mental health services we'd love to hear from you.



charity@oxfordhealth.nhs.uk



OxfordHealthCharity



OxHealthCharity



Oxford-health-charity

Or write to us – Oxford Health Charity, Warneford Hospital, Warneford Lane, Oxford, OX3 7JX

More information, including how to make a donation is available on our website www.oxfordhealth.charity



Accounts



FUNDS HELD ON TRUST ANNUAL ACCOUNTS FOR THE YEAR ENDED 31 MARCH 2022

The accounts of the funds held on trust by Oxford Health NHS Foundation Trust

FOREWORD

These accounts have been prepared by the Trustee in accordance with the requirements of 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 2015).

Statutory Background

The Charitable Fund came into force on 31 July 1996 under Statutory Instrument dated 8 July 1996. The Secretary of State for Health exercised his powers under section 92(1) of the National Health Service Act 1977(a) and the Trust property was transferred from the Oxfordshire Health Authority upon the establishment of the Oxfordshire Mental Healthcare NHS Trust.

On 1 April 2006 the Charity expanded through the inclusion of the mental health related fund balance within the Buckinghamshire Mental Health NHS Trust Charitable Fund (registered charity number 1054087), following the merger by acquisition of Buckinghamshire Mental Health NHS Trust by Oxfordshire Mental Healthcare NHS Trust.

On 31 October 2011 Oxfordshire Primary Care Trust Charity (registered charity number 1091570) was merged with this Charity, following the transfer of Community Health Oxfordshire services from Oxfordshire Primary Care Trust to Oxford Health NHS Foundation Trust.

The name of the Charity was changed from the 'Oxfordshire Mental Healthcare Charitable Fund' to the 'Oxfordshire and Buckinghamshire Mental Health Charitable Fund' during the year ended 31 March 2009. The name of the Charity was changed from the 'Oxfordshire and Buckinghamshire Mental Health Charitable Fund' to 'Oxford Health Charitable Funds' during the year ended 31 March 2012. The name of the Charity was changed from the 'Oxford Health Charitable Funds' to 'Oxford Health Charity' during the year ended 31 March 2015.

Oxford Health NHS Foundation Trust is the sole corporate trustee of Oxford Health Charity.

Oxford Health Charity is registered with the Charity Commission (registered charity number 1057285).

Main Purpose of the Charitable Funds held on trust

The main purpose of the charitable funds held on trust is to apply income for any charitable purpose relating to the National Health Service wholly or mainly for the services provided by the Oxford Health NHS Foundation Trust.

Signed: 

Dr Nick Broughton
on behalf of the Corporate Trustee

Date: 26th January 2023

Introduction

The Oxford Health Charity ('the Charity') exists to benefit the patients and service users of the Oxford Health NHS Foundation Trust (and, in the case of a small number of funds, patients and others receiving the services of other parts of the National Health Service and related services).

The bulk of the clinical services provided by the Oxford Health NHS Foundation Trust are funded, of course, from the NHS. In comparison to NHS funding the amounts of money available through the Charity are small, but often a relatively small amount of funding allows activities which NHS funding would not provide. Such funding helps to innovate or to ensure that patients and service users have a wider range of opportunities.

Objectives and Activities

The Charity's governing document is a trust deed dated 31 July 1996, as amended by supplemental deeds dated 6 October 2008 and 29 June 2011.

The objects of the Charity are to apply income for any charitable purposes relating to the NHS wholly or mainly for the services provided by the Oxford Health NHS Foundation Trust.

The main activities of the Charity are to provide public benefit by supporting the good health and welfare of patients and service users.

Achievements and Financial Review

The main body of this Annual Report highlights the achievements of Oxford Health Charity over the 2021-22 period. As an NHS Charity, Oxford Health Charity is managed through a Corporate Trustee (made up of the Board members of the Oxford Health NHS Foundation Trust) and with designated responsibilities given to the Charity Committee. The Committee oversees the expenditure, activities, fundraising and strategic planning of the charity with day to day work on all these areas delivered through the Charity and Involvement Team employed by the Trust. Financial management of the charity sat with Moore Kingston Smith for this period.

The strategic aims of the charity link in with the Trusts commitment to ensure it is caring, safe and excellent across all services and it works in partnership with patients, carers, governors, volunteers and staff to deliver. The Corporate Trustee and stakeholders across the Trust are involved in the development and delivery of strategic aims for the charity and future objectives will be subject to consultation and engagement activities throughout 2022/23.

The Charity's total funds in management were £1,258k as at 31 March 2022, similar to the previous year (2021: £1,312k).

Overall total income decreased to £552k from £780k. This decrease is attributed to the decrease in donations due to COVID 19, including a £132k donation from NHS Charities Together. There was also a decline in the value of the charity's investment portfolio, both due to the global economic downturn and the charity releasing investments.

Total expenditure for the Charity decreased to £652k (2021: £940k).

Major fundraising and support projects are illustrated throughout the report.

The investments are managed by abrdn plc on a discretionary basis. During the year there were gains of £46k (2021: gains of £171k due to revaluation and disposals).

Investment Policy

Other than small amounts of cash at bank and funds related to the ROSY Fund (discussed below) the Charity's funds are invested on a discretionary basis with abrdn plc. The Charity Committee regularly reviews the Charity's investment strategy, including the spread of asset allocation, appropriate benchmarks and issues of social responsibility.

The Charity's investment objective is to maximise long-term returns (rather than short-term income), but with an emphasis upon capital preservation. The portfolio is operated on a discretionary management basis with abrdn plc, allowing the investment manager more flexibility in responding to the investment market.

The Charity aims as far as possible to avoid investments in alcohol and tobacco. The investment policy allows abrdn plc to invest in general funds, provided that these were reviewed quarterly to ensure no more than minimal exposure to alcohol and tobacco, and that investments are changed where necessary to ensure this. With property investments the Charity seeks to avoid investments which are predominantly related to alcohol and tobacco, and this is reviewed on an annual basis.

The Charity aims to maintain the allocation of the portfolio within allocated ranges.

	Range as at 31/03/22
Equities	25%-65%
Fixed Interest bonds	10%-40%
Property	10%-30%
Cash	5%-20%
Absolute Return Funds	< = 10%

The ranges above have not changed since June 2015.

The performance of the investment portfolio is monitored on a quarterly basis against appropriate indices for the class of investment concerned. In addition the performance of the portfolio as a whole is measured against an overall benchmark based on a weighted average of the individual indices.

Funds related to ROSY (Respite nursing for Oxfordshire's Sick Youngsters) are held in cash deposits in order to ensure that ongoing costs of nursing staff can be met as they arise. These short-term deposits are recognised as current asset investments in the accounts of the Charity. The total investment cash holdings related to the ROSY Fund are excluded from the target allocation ranges set out above.

Governance – About the Charity

Oxford Health Charity is registered with the Charity Commission (charity number: 1057285) in accordance with the Charities Act 2011. The Charity has a corporate trustee: the Oxford Health NHS Foundation Trust.

The members of the Oxford Health NHS Foundation Trust Board of Directors serve as agents for the Corporate Trustee. The Trust Board members who served in this way during the year and up to the date of this report were:

Non-executive Directors	David Walker (Chair) Sir John Allison to 31 March 2022 Bernard Galton to 31 December 2021 Chris Hurst (Senior Independent Director and Vice Chair) Dr Aroop Mozumder to 31 September 2021 Prof Kia Nobre from 1 July 2021 Sir Philip Rutnam from 1 January 2022 Mohinder Sawhney Lucy Weston Andrea Young from 1 January 2022
Executive Directors	Dr Nick Broughton, Chief Executive from 15 June 2020 Marie Crofts, Chief Nurse Charmaine De Souza, Chief People Officer from 4 October 2021 Dr Karl Marlowe, Chief Medical Officer from 10 May 2021 Grant Macdonald, Managing Director of Mental Health, Learning Disabilities and Autism from 21 March 2022 Mike McEnaney, Director of Finance Dr Mark Hancock, Medical Director to 7 May 2021 Dr Ben Riley, Executive Managing Director – Primary, Community and Dental Care Debbie Richards, Managing Director of Mental Health Services & Learning Disabilities Care to 24 October 2021 (Tehmeena Ajmal acted up until March 2022 when Grant Macdonald commenced) Kerry Rogers, Director of Corporate Affairs and Company Secretary (non-voting) Martyn Ward, Director of Digital and Transformation (non- voting)

Lucy Weston is Chair of the Charity Committee of the Oxford Health NHS Foundation Trust.

Governance – About the Charity

The Board of Directors has delegated responsibility for the day to day management of the Charity to the Charity Committee, who in turn delegate day to day management to dedicated Trust employees and Moore Kingston Smith Association Management.

Charity Registered Number 1057285

Principal Office
Warneford Hospital
Warneford Lane
Oxford
OX3 7JX

Bankers
Lloyds Bank Plc
87 London Road
Oxford
OX3 9AB

Independent Examiner
Grant Thornton UK LLP
110 Bishopsgate
London
EC2N 4AY

Investment Fund Manager
abrdn plc
Bow Bells House
1 Bread Street
London
EC4M 9HH

Structure and Management

At 31 March 2022 the Charity was constituted of 45 funds (2021: 47). None of the funds in the year or at year-end were endowment funds. The material funds (other than control funds) at 31 March 2022 were:

	£000
Respite nursing for Oxfordshire's Sick Youngsters (ROSY) (restricted)	372
Legacies (restricted)	119
Community Directorate Fund (designated)	59
NHS Charities Together – Stage 3 funding (restricted)	58
Trustwide General Fund (designated)	46
Wallingford Community Hospital (designated)	44
NHS Charities Together (restricted)	10

The Corporate Trustee, in fulfilling its legal duties, ensures that funds are spent in accordance with the purposes of each fund and designates funds in accordance with the wishes of donors.

Non-Executive members of the Oxford Health NHS Foundation Trust's Board of Directors ('the Board') are appointed by the Oxford Health NHS Foundation Trust's Council of Governors. Executive members of the Board are appointed by Oxford Health NHS Foundation Trust under normal staff recruitment procedures. Neither they nor the non-executive members of the Trust Board are individual trustees under charity law. All Directors and Non-Executive Directors are provided with appropriate background information in relation to their management of the Charity.

Acting for the Corporate Trustee, the Charity Committee is responsible for the overall management of the Charity. The Charity Committee is required to:

- Apply the charitable funds in accordance with the Charity's governing documents and the Charities Act 2011.
- Prepare and communicate a statement of policy for all fundraising activities, their approval, monitoring and administration to ensure that such activities, including disbursements, adhere to statutory and other relevant guidelines.
- Supervise the proper investment and administration of the charitable funds. This is done in conjunction with the Director of Finance and the Audit Committee of the Oxford Health NHS Foundation Trust, and with the support of an administrative and accounting service from Moore Kingston Smith Association Management.

Structure and Management

The Trustee (the Oxford Health NHS Foundation Trust) delegates the responsibility for the Charity to the Charity Committee, which in turn delegate the day to day management to dedicated Trust employees and Moore Kingston Smith Association Management.

The Charity Committee is quorate with two Non-executive directors and one Executive Directors of the NHS Foundation Trust, the Director of Corporate Affairs & Company Secretary, a representative of the Trust's Finance Department, along with an external member, and other key stakeholders. The external member during the year was Olga Senior.

The Charity Committee meets quarterly. At each meeting items of expenditure of amounts of £500 and above are reviewed and consideration is given to investment performance, management accounts and the stewardship of the funds. In addition any requests for funding over £10k are presented for discussion and approval.

Public Benefit

In exercising its duties and powers with regard to the Charity, the Corporate Trustee has complied with its duty under s17 of the Charities Act 2011 to have due regard to the guidance on public benefit issued by the Charity Commission. The Charity aims to serve the public benefit by promoting the welfare of the patients and service users of Oxford Health NHS Foundation Trust (and where appropriate patients served by other parts of the NHS or related services). This is carried out by: promoting improvements in care over and above that which would ordinarily be provided by the National Health Service; the purchase of equipment; improvements to the care environment; and by promoting activities that assist reintegration into the community. In addition, the Charity funds activities related to the education and welfare of staff of the Oxford Health NHS Foundation Trust where this leads to better standards of care and hence benefits patients and service users.

Consolidation of Accounts

HM Treasury has concluded that in compliance with International Accounting Standard 27, the financial position and results of NHS charities should be consolidated into the accounts of the related NHS body wherever that NHS body is the corporate trustee of the charity and therefore has the power to control and benefit from the charity which it administers as corporate trustee. NHS Charities remain independent, and charity law requires that trustees act in accordance with the charity's purposes and in the best interests of the charity and its beneficiaries and do not act on the policies or directions of any other body. Therefore when the Corporate Trustee considers the affairs of the Charity, although it does have control over those affairs, it is required to make decisions solely in the interest of the Charity and its beneficiaries and not in the interests of the NHS Foundation Trust.

Consolidation is only required where the figures are material to the accounts of the NHS body. In the case of Oxford Health NHS Foundation Trust, the NHS body is the corporate trustee of the Charity, but the figures related to the Charity are not considered to be material to the accounts of the NHS body, and therefore the charity figures are not consolidated within the accounts of that body. It remains the case that the funds of the Charity can only be used for charitable purposes.

Partnership Working

Patients and service users of the Oxford Health NHS Foundation Trust are the main beneficiaries of the Charity. The Oxford Health NHS Foundation Trust is a related party by virtue of being Corporate Trustee of the Charity. By working in partnership with the Oxford Health NHS Foundation Trust, the charitable funds are used to best effect. When deciding on the most beneficial way to use charitable funds, the Charity Committee of the Oxford Health NHS Foundation Trust, acting as agent of the Corporate Trustee, has regard to the main activities, objectives and plans of the Oxford Health NHS Foundation Trust.

Reserves Policy

The Charity held £1,258k in total including £630k restricted funds as at 31 March 2022. Charitable reserves are defined as income which becomes available to the Charity and is to be spent at the Trustee's discretion in furtherance of any of the Charity's objects, but which is not yet spent, committed or designated. The definition of reserves therefore excludes:

- o Restricted funds
- o Designated funds

Restricted Funds would be established where monies have been bequeathed or donated to the Charity which are subject to donor intention, which limit their use to particular purposes, arising for example from restrictions imposed by the donor. Such funds would be held and used only when a purpose for which they are available arises.

Unrestricted Funds comprise donations and other charitable income received for general purpose charitable use which are credited to general funds whenever possible or where donors have expressed wishes as to how the funds might be used they are allocated to the relevant designated fund held for the intended purpose. Funds are often derived from unsolicited donations and/or from legacies and are therefore unpredictable.

Designated funds are administered by Fund Advisors in accordance with policies and procedures set by the Trustee. The funds are monitored in terms of expenditure plans, ensuring they are spent within a reasonable period of time. In line with the Charity Commission's guidance, a separate reserves policy is not required for designated funds.

Within unrestricted funds, the Charity also holds net undistributed investment gains on unrestricted funds. The purpose of holding these monies is to protect the activities supported, by providing a buffer against future adverse market conditions. The Trustee aims for the balance held in this way to be not less than 25% of the market value of non-cash investments. At 31 March 2022 this balance amounted to £209k which was equivalent to 28% (2021: 25% £266k) of the market value of non-cash investments. The level of the buffer will fluctuate from year to year depending upon movements in the market. The Trustee will endeavour to continue to maintain the buffer within the target set.

General Funds are those elements of the Unrestricted Funds which have not been designated for specific purposes and which are not being held as a buffer against future adverse market conditions. General Funds are included under unrestricted funds in the Charity's accounts.

General Funds	Reserves at 31 March 2022	Expenditure 2021/22
	£	£
Trustwide General	46,365	48,593
Buckinghamshire Mental Health General	34,258	5,201
Marjorie Henderson Fund	20,129	5,166
Total	100,752	58,961

The Committee continues to review the charitable funds regularly and to direct income (including legacies) where possible (where the term of the gift allows it) for use in trust wide general funds.

The Charity Committee reviews the position on reserves.

Going Concern

The Trustee considers that the Charity has adequate financial resources and is well placed to manage the business risks that it faces. The Trustee's assessment of the Charity's position takes into consideration the current economic climate and its potential impact on the Charity's sources of income and planned expenditure. The Trustee has a reasonable expectation that the Charity has adequate resources to continue in operational existence for the foreseeable future. The Trustee believes that there are no material uncertainties that call into doubt the Charity's ability to continue in operation. Accordingly, the accounts have been prepared on the basis that the Charity is a going concern.

Risk Management

The Charity maintains a risk register containing all its principal risks and has throughout the year reviewed risks and the systems and procedures established to manage them.

The Charity has detailed Expenditure Rules which set out how funds can and should be used. These are subject to regular review.

The Charity's investments are regularly reviewed by the Charity Committee, including the comparison of returns against suitable benchmarks.



Signed by Dr Nick Broughton

Date 26th January 2023

Statement of Trustee's Responsibilities

The Trustee is responsible for preparing the Trustee's Annual Report and the accounts in accordance with applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice) including FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland."

The law applicable to charities in England and Wales requires the Trustee to prepare accounts for each financial year which give a true and fair view of the state of affairs of the Charity and of the incoming resources and application of resources of the Charity for that period. In preparing these accounts, the Trustee is required to:

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

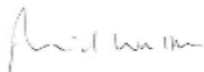
The Trustee is responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the Charity and enable it to ensure that the accounts comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the Charity's trust deed. The Trustee is 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.

The Trustee is responsible for the maintenance and integrity of the charity and financial information included on the Charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.

The Trustee confirms that it has met the responsibilities set out above and has complied with the requirements for preparing the accounts. The accounts set out on pages 30 to 63 have been compiled from and are in accordance with the financial records maintained by the Trustees.

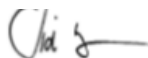
By Order of the Trustees

Signed:



Chair, David Walker

Date 26 January 2023



Director Trustee,
Dr Nick Broughton

Date 26 January 2023

Independent Examiner's Report to the Corporate Trustee of Oxford Health Charity

I report on the accounts of Oxford Health Charity (the "charity") for the year ended 31 March 2022, which are set out on pages 30 to 63.

Independent examiner's statement

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

- 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 2011;
 - to prepare accounts which accord with the accounting records; and
 - to comply with the applicable requirements concerning the form and content of accounts set out in - the Charities (Accounts and Reports) Regulations 2008

have not been met, or

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

Basis of independent examiner's statement

My examination was carried out in accordance with the general Directions given by the Charity Commission. An examination includes a comparison of the accounts with the accounting records kept by the charity. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from you as corporate trustee 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 accounts present a 'true and fair' view and the report is limited to those matters set out in the statement above.

Respective responsibilities of corporate trustee and examiner

The charity's corporate trustee is responsible for the preparation of the accounts. The charity's trustee considers that an audit is not required for this year under section 149(2) of the Charities Act 2011 and that an independent examination is needed.

It is my responsibility to:

- examine the accounts under section 149 of the Charities Act 2011;
- to follow the procedures laid down in the general Directions given by the Charity Commission under section 149(5)(b) of the Charities Act 2011; and
- to state whether particular matters have come to my attention.

Your attention is drawn to the fact that the charity's trustees have prepared the charity's accounts in accordance with the Statement of Recommended Practice '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) issued in October 2019 in preference to the Statement of Recommended Practice 'Accounting and Reporting by Charities: Statement of Recommended Practice (revised 2005)' issued in April 2005 which is referred to in the Charities (Accounts and Reports) Regulations 2008 but has been withdrawn. I understand that the charity's trustees have done this in order for the charity's accounts to give a true and fair view in accordance with United Kingdom Generally Accepted Accounting Practice effective for reporting periods beginning on or after 1 January 2019.

Use of this report

This report is in respect of an examination carried out under section 149(3) of the Charities Act 2011. This report is made solely to the charity's corporate trustee, as a body, in accordance with the regulations made under section 154 of the Charities Act 2011. My work has been undertaken so that I might state to the charity's trustees those matters I am required to state to them in an independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the charity and the charity's trustee, as a body, for my work, for this report or for the opinions I have formed.

Ciaran McLaughlin, CPFA

Grant Thornton UK LLP
Chartered Accountants
London

26 January 2023

Statement of Financial Activities for the year ended 31 March 2022

	Year Ended 31 March 2022			Year Ended 31 March 2021	
	Note	Unrestricted Funds £000	Restricted Funds £000	Total Funds £000	Total Funds £000
Income from:					
Donations and Legacies	3				
Donations & voluntary grants		46	222	268	553
Legacies		3	129	132	22
Grants – from other NHS Charities		-	-	-	174
Grants – other		-	130	130	10
Sub total: donations & legacies		<u>49</u>	<u>481</u>	<u>530</u>	<u>759</u>
Investments	8.3	22	-	22	21
Total income		<u>71</u>	<u>481</u>	<u>552</u>	<u>780</u>
Expenditure on:					
Raising funds					
Costs of generating voluntary income		15	-	15	9
Investment management costs		8	-	8	9
Sub total: expenditure on raising funds		<u>23</u>	<u>-</u>	<u>23</u>	<u>18</u>
Charitable activities	6,7				
Patient welfare		136	306	442	380
Staff welfare		29	22	51	412
Research and education		59	77	136	130
Sub total: expenditure on charitable activities		<u>224</u>	<u>405</u>	<u>629</u>	<u>922</u>
Total expenditure		<u>247</u>	<u>405</u>	<u>652</u>	<u>940</u>
Net gains/(losses) on investments		46	-	46	171
Net income/(expenditure)		<u>(130)</u>	<u>76</u>	<u>(54)</u>	<u>11</u>
Transfer between funds		1	(1)	-	-
Net movement in funds		<u>(129)</u>	<u>75</u>	<u>(54)</u>	<u>11</u>
Reconciliation of funds:					
Total funds brought forward at 1 April		<u>757</u>	<u>555</u>	<u>1,312</u>	<u>1,301</u>
Total funds carried forward at 31 March		<u>628</u>	<u>630</u>	<u>1,258</u>	<u>1,312</u>

Comparative figures for each class of funds are provided in note 12 to the accounts.
All income and expenditure resources relate to continuing operations.
The Charity has no gains or losses other than those recognised in this Statement of Financial Activities
The notes on pages 48 to 63 form part of these accounts.

Balance Sheet as at 31 March 2022

	Note	Unrestricted Funds £000	Restricted Funds £000	Total Funds 2022 £000	Total Funds 2021 £000
Fixed assets					
Investments	8.1	584	221	805	1,055
Total fixed assets		584	221	805	1,055
Current assets					
Debtors	9	3	18	21	22
Cash at bank and in hand		62	432	494	294
Total current assets		65	450	515	316
Liabilities					
Creditors: Amounts falling due within one year	10	21	41	62	59
Net current assets/ (liabilities)		44	409	453	257
Net assets		628	630	1,258	1,312
Funds of the Charity					
Income funds:					
Restricted	11.1	-	630	630	555
Unrestricted	11.3	628	-	628	757
Total funds		628	630	1,258	1,312

Comparative figures for each class of funds are provided in note 13 to the accounts.

The notes on pages 48 to 63 form part of these accounts.

These accounts (Registered Charity number 1057285) were approved by the trustee on

and were signed on its behalf by:



Dr Nick Broughton Date: 26 January 2023

Notes to the Accounts

1. Basis of Preparation

The accounts have been prepared under the historic cost convention, with the exception of investments which are included at market value. The accounts comply 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) (Charities SORP (FRS 102) (effective 1 January 2015)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Charities Act 2011.

The accounts have been prepared on the going concern basis which assumes the Charity will continue for the foreseeable future. The Trustee believes that there are no material uncertainties that call into doubt the Charity's ability to continue in operation.

The Charity has taken advantage of the exemption available under FRS 102 and has not produced a Cash Flow Statement as it is a small charity. The principal accounting policies, which have been applied consistently throughout the current financial year are set out below.

1.2 Income

a) Donations

All donations are included in full in the Statement of Financial Activities as soon as the following three factors can be met:

i) entitlement - when control over the rights or other access to the economic benefit has passed to the charity (in the case of a donations, entitlement usually arises immediately on its receipt); and

ii) probable - when it is more likely than not that the economic benefits associated with the transaction or gift will flow to the charity; and

iii) measurement - when the monetary value or amount of the income can be measured reliably and the costs incurred for the transaction and the costs to complete the transaction can be measured reliably.

b) Legacies
Legacies are accounted for upon receipt or where receipt of the legacy is probable and the amount receivable can be estimated with sufficient accuracy. This will be once confirmation has been received from the representatives of the estate that payment of the legacy will be made or property transferred and once all conditions attached to the legacy have been fulfilled and the amount receivable is known with reasonable certainty.

c) Grants
Income from grants is recognised when there is evidence of entitlement to the gift, receipt is probable and its amount can be measured reliably.

If the grant has conditions attached which must be fulfilled before the Charity has control of the resources, the meeting of these conditions is within the Charity's control and there is sufficient evidence that the conditions will be met, then the grant is recognised. However, where the meeting of the conditions is not probable or not within the control of the Charity, the grant would not be recognised until the conditions set have been met.

If a donor imposes a time period in which the expenditure of resources can take place, and a grant is received for expenditure that must take place in a future accounting period, it would be accounted for as deferred income and recognised as a liability until the accounting period in which the Charity is allowed by the condition to expend the resource. If the donor has given the condition that they can recover any unexpended part of the grant, the liability for any repayment would be recognised only when repayment becomes probable.

d) Income from Charitable Activities and Other Trading Activities
Income from charitable activities and other trading activities is accounted for on an accruals basis as goods or services are supplied.

e) Income from Investments
Investment income is accounted for in the period in which the Charity is entitled to receipt and the amount can be measured with reasonable certainty.

f) Allocation of Income to Funds
Income is credited to a fund which will benefit the area where the donor has imposed a restriction or expressed a wish, for how their gift should be used and are classified as restricted or designated funds accordingly. If the donor has not expressed a wish for how their gift should be used, it is credited to an Unrestricted General fund and used at the Trustee's discretion in accordance with the objects of the Charity.

1.3 Expenditure

- a) The accounts are prepared in accordance with the accruals concept.

All expenditure is recognised once there is a legal or constructive obligation committing the Charity to the expenditure.

The Statement of Financial Activities provides an analysis of expenditure based on the nature of the activity undertaken. Expenditure is divided between three main activities:

Raising Funds, Charitable Activities and Other (if required).

- b) Raising Funds

These include the costs of generating voluntary income (fundraising costs), costs of fundraising trading and investment management fees. These costs are apportioned directly against the individual funds generated.

- c) Charitable Activities

Costs of charitable activities comprise all costs incurred in the pursuit of the Charity's objectives and inline with SORP 2015 (FRS 102) also include governance costs for the Charity. Expenditure on charitable activities will be for the benefit of Patients, Staff, Research or Education. Throughout these accounts the term 'patients' refers to patients and service users. The costs include the direct costs of the charitable activities together with governance & support costs that enable them to be undertaken.

Governance & Support Costs

Governance costs include the costs of governance arrangements which relate to the general running of the Charity, allowing it to operate and to generate the information required for public accountability. Included under this heading are direct costs such as independent examination, legal advice and costs associated with statutory requirements such as preparing statutory accounts.

Governance costs are accounted for on an accruals basis and include an element of the charge for the administration and accounting service provided by Moore Kingston Smith Association Management. In addition Oxford Health Charity governance and support are provided by the Head of Charity and Involvement and Charity Development Manager (1.3FTE). Both individuals are employed by Oxford Health NHS Foundation Trust with costs for the Development Manager recharged against the Charity.

Support costs are those costs that, whilst necessary to deliver an activity, do not themselves produce or constitute the output of the activity. Support costs are allocated to charitable activities in the Statement of Financial Activities.

Support costs are accounted for on an accruals basis as charges for a full administration and accounting service provided by Moore Kingston Smith Association Management. These charges comprise of a monthly management fee.

Both governance & support costs are allocated to charitable activities in the SOFA and further details provided in note 7.

d) Apportionment of Governance and Support Costs

The majority of governance and support costs are recognised within the reserves against the net control fund held in control accounts. Apportionment across individual funds is considered for specific governance project costs.

e) VAT

VAT is charged gross as the charity is not VAT registered.

f) Liabilities

Liabilities are recognised at their settlement value or best estimate where the final settlement value is unknown.

1.4 Structure of Funds

Funds where the capital is held to generate income for charitable purposes and cannot itself be spent would be accounted for as endowment funds. Where there is a legal restriction on the purpose to which a fund may be put, the fund is classified in the accounts as a restricted fund. Other funds are classified as unrestricted funds.

The Charity does not hold any endowment funds. Funds which are not legally restricted but which the Trustee has chosen to earmark for set purposes, and in line with donors' wishes, are classified as designated funds. The major funds held within this category are disclosed in notes 11.3 and 11.4.

1.5 Fixed Asset Investments

Fixed asset investments comprise Common Investment Funds and cash and are managed by abrdn plc.

Investments are shown at market value as at the balance sheet date. The market value is the mid-price on 31 March as supplied by the investment managers.

The Statement of Financial Activities includes the net gains (or losses) arising on revaluation and disposals of investments throughout the year.

1.6 Current Asset Investments

Where, as part of the management of the investment portfolio, cash deposits are held at bank on terms of under one year and are now accessible with less than 24 hours notice, they are shown as current asset investments.

1.7 Investment Gains and Losses

All gains and losses are taken to the Statement of Financial Activities as they arise.

Realised gains and losses on investments are calculated as the difference between sales proceeds and opening market value (or cost at date of purchase, if later). Unrealised gains and losses are calculated as the difference between market value at the year end and opening market value (or cost at date of purchase, if later).

1.8 Taxation

Oxford Health Charity is a registered charity and as such benefits from certain exemptions from taxation on income and gains, to the extent that they are applied for charitable purposes.

1.9 Key Assumptions and Judgements

The charity accrues for items of expenditure which relate to the previous year where invoices have not been processed or received before the year end. Estimates are made in some instances where invoices have not been received based on activity and/or expenditure for the year to date. No significant judgements have been made in preparing the accounts. No key assumptions have been made regarding any sources of estimation uncertainty with a significant risk of causing a future material adjustment.

2 Related Party Transactions

The sole corporate trustee of the Charity is Oxford Health NHS Foundation Trust ('the Trust').

The results of the Charity are not consolidated into the accounts of the Trust for the year, as discussed in more detail in the trustee's Annual Report.

The members of the Trust's Board of Directors during the year are disclosed in the Annual Report of the Charity.

During the year none of the members of the Trust's Board of Directors or members of the key management staff or parties related to them have undertaken any material transactions with the Charity. No expenses or remuneration were paid to the members of the Trust's Board of Directors from the Charity during the year (members of the Trust's Board of Directors, some of whom are employees of the Trust, are remunerated by the Trust in respect of the work that they carry out for the Trust). None of the transactions below relate to trustees.

Transactions between the Charity and Oxford Health NHS Foundation Trust 2021/22

	Apr 21	Expense incurred in year	Paid in year	Creditor c/fwd at 31 Mar 22
	£000	£000	£000	£000
To reimburse the Trust for salary payments for clinical staff and charity support staff (none made for trustees)	24	278	(298)	4
To reimburse the Trust for miscellaneous goods and services purchased on behalf of the Charity	22	87	(107)	2
Total expenditure	46	365	(405)	6

3 Income and Donations

3.1 Income from donations & voluntary grants

Donations are received from individuals.

3.2 Income from legacies

Legacy income is only included in incoming resources when receipt is probable and the amount is known/or can be reliably estimated, or the legacy has been received.

3.3 Grants

One significant grant was received during the year from NHS Charities Together.

4 Charitable Activities

Income from charitable activities comprises income from courses and speaking events.

5 Other Trading Activities

Income from other trading activities comprises income from the sales of donated goods. The costs related to this activity are included within 'Fundraising trading: costs of goods sold and other costs'.

6 Analysis of Charitable Expenditure

	Equipment	Other Activities	Support Costs	Governance Costs	Total 2022	Total 2021
	£000	£000	£000	£000	£000	£000
Patient welfare and amenities	16	406	9	11	442	380
Staff welfare and amenities	6	33	1	11	51	412
Research and Education	37	75	2	22	136	130
	59	514	12	44	629	922

7 Analysis of Governance and Support Costs

7.1 An allocation of overhead and support costs has been made to governance costs.

2022	Governance Costs Allocated to Unrestricted Funds £000	Governance Costs Allocated to Restricted Funds £000	Total Governance Costs £000	Support Costs Allocated to Charitable Activities £000	Total Governance and Support Costs £000
Audit fee	-	-	-	-	-
Other Costs	44	-	44	12	56
	44	-	44	12	56

2021	Governance Costs Allocated to Unrestricted Funds £000	Governance Costs Allocated to Restricted Funds £000	Total Governance Costs £000	Overhead and Support Costs Allocated to Charitable Activities £000	Total Governance and Support Costs £000
Audit fee	3	-	3	-	3
Other Costs	37	-	37	18	55
	40	-	42	18	58

Other Costs include printing stationery, capital charges and administrative costs.

7.2 Allocation of Support Costs

The support costs not related to governance activities are then allocated to expenditure on charitable activities based on the purposes of each fund across the four main charitable activities of the Charity as follows: This relates to patient christmas parties, catering and education, books and subscriptions.

	Patient Welfare £000	Staff Welfare £000	Research £000	Education £000	Total 2021 £000	Total 2020 £000
Other costs	9	1	-	2	12	18
	9	6	-	2	12	18

7.3 Analysis of Staff Costs

The Charity uses the services of Moore Kingston Smith Association Management. The charity does not directly employ any staff, however the Head of Charity and Involvement and Charity Development Manager (1.3FTE) are employed by the Oxford Health NHS Foundation Trust. These two posts are directly involved in the management of the charity.

In addition to this the ROSY fund primarily exists to provide clinical respite care and as such a varying number of clinical staff are employed by Oxford Health NHS Foundation Trust as a result of this funding.

8 Analysis of Investments

8.1 Movement in Fixed Asset Investment

	Non-Cash Investments £000	Cash Investments £000	Total 2022 £000	Total 2021 £000
Market value brought forward at 1 April	1,012	43	1,055	872
Less: Disposals proceeds	(349)	(357)	(706)	(381)
Add: Additions to investments at cost	39	369	408	398
Net gain/ (Loss) on revaluation	48	-	48	166
Market value carried forward at 31 March	750	55	805	1,055
Historic cost at 31 March	710	55	765	959

8.2 Market Value of Fixed Asset Investments at 31 March

	Total 2022 £000	Total 2021 £000
Investments in Common Investment Funds	750	1,012
Cash held as part of the investment portfolio	55	43
	805	1,055

The fixed asset investments are domiciled in the UK, except for the sum of £119k (2021: £152k) which is invested in non-UK domiciled investment funds.

8.3 Analysis of Investment Income

	Total 2022 £000	Total 2021 £000
Gross Income from Investments		
Investments in Common Investment Funds	22	21
	22	21

9 Analysis of Debtors

Debtors due within one year

	Total 2022 £000	Total 2021 £000
Prepayments and accrued income	21	22
	21	22

10 Analysis of Creditors

Creditors Falling due Within One Year

	Total 2022 £000	Total 2021 £000
Accruals	33	8
Other creditors	29	51
	62	59

11 Analysis of Funds

11.1 Restricted Funds

	Balance B/Fwd at 01/04/21 £000	Income £000	Expenditure £000	Transfer £000	Balance C/Fwd at 31/03/22 £000
Material Funds					
Respite Nursing for Oxfordshire's Sick Youngsters ROSY	362	253	-243	-	372
Legacies	53	96	-30	-	119
NHS Charities Together	72	-	-61	-1	10
NHS Charities Together – Stage 3	-	132	-74		58
Other Funds	68	9	-6	-	71
Total	555	490	-414	-1	630
Restricted Funds - Comparatives					
Material Funds					
Respite Nursing for Oxfordshire's Sick Youngsters ROSY	431	183	(235)	(17)	362
Legacies	-	-	-	53	53
NHS Charities Together	-	176	(104)	-	72
Other Funds	13	4	-	51	68
Total	444	363	(339)	87	555

11.2 Details of Material Restricted Funds

Respite nursing for Oxfordshire's Sick Youngsters - ROSY funds

Patient welfare including respite nursing for terminally, acutely or chronically ill children and babies in their homes.

11.3	Unrestricted Funds	Balance B/Fwd at 01/04/21 £000	Income £000	Expenditure £000	Investment gains/losses £000	Transfer between funds £000	Balance C/fwd at 31/03/22 £000
	Investment Control Account	266	20	(123)	46	-	209
	Community Directorate Fund	20	1	(20)	-	58	59
	Trustwide General fund	74	17	(45)	0	-	46
	Wantage Hospital	73	-	(38)	-	-	35
	Wallingford Community Hospital	61	-	(5)	0	(12)	44
	Other Funds	263	33	(16)	-	(45)	235
	TOTAL	757	71	(247)	46	1	628
	Unrestricted Funds - Comparatives	Balance B/Fwd at 01/04/20 £000	Income £000	Expenditure £000	Transfer between funds £000	Gains £000	Balance C/fwd at 31/03/21 £000
	Investment Control Account	193	21	(100)	171	(19)	266
	Trustwide General Fund	110	375	(388)		(23)	74
	Wantage Hospital Fund	73	-	-		-	73
	Wallingford Community Hospital	62	-	(1)		-	61
	Other Funds	419	20	(111)		(45)	283
	TOTAL	857	416	(600)	171	(87)	757

11.4 Details of material unrestricted funds

Name of fund	
Net control funds held in control accounts	Net control funds is comprised of net investment gains and income less administration charges prior to distribution/ charging to unrestrictive funds
Trustwide General fund (4000)	For the benefit of patients and staff trust wide – general – designated
Wantage Hospital fund (3026)	Funds to support the services provided by Wantage hospital - designated
Wallingford Community Hospital fund (3029)	Funds to support the services provided by Wallingford hospital- designated
Community Directorate Fund	Fund to support the services provided by current Trust directorate - designated
Other Funds	Other funds of £235k

Charities SORP (FRS '102) requires comparative information for each class of funds presented in the SoFA. Note 12 below shows comparatives for each class of funds as required by Charities SORP (FRS 102).

12 Fund Comparatives

	Comparative per Fund Class as at 31 March 2021		
	Unrestricted Funds £000	Restricted Funds £000	Total Funds £000
Income from:			
Donations and Legacies			
Donations	381	172	553
Legacies	5	17	22
Grants – from other NHS charities	-	174	174
Grants – other	10	-	10
Sub total: donations and legacies	396	363	759
Charitable activities	-	-	-
Investments	21	-	21
Total income	417	363	780
Expenditure on:			
Raising funds			
Costs of generating voluntary income	9	-	9
Investment management costs	9	-	9
Sub total: expenditure on raising funds	18	-	18
Charitable activities			
Patient welfare	112	268	380
Staff welfare	376	36	412
Education	95	35	130
Sub total: expenditure on charitable activities	583	339	922
Total expenditure	601	339	940
Realised and unrealised losses on revaluation and disposal of investment assets	171	-	171
Transfer between funds	(87)	87	-
Net (expenditure) and net movement in funds for the year	(100)	111	11
Reconciliation of funds:			
Total funds brought forward at 1 April	857	444	1,301
Total funds carried forward at 31 March	757	555	1,312

Charities SORP (FRS 102) requires comparative information for each class of funds presented in the Balance Sheet.

Note below shows comparatives for each class of funds as required by Charities SORP (FRS 102).

13 Fund Comparatives

Comparative per Fund Class as at 31 March 2021

	Unrestricted Funds £000	Restricted Funds £000	Total Funds 2020 £000
Fixed assets			
Investments	968	87	1,055
Total fixed assets	<u>968</u>	<u>87</u>	<u>1,055</u>
Current assets			
Debtors	14	8	22
Cash at bank and in hand	(191)	485	294
Total current assets	<u>(177)</u>	<u>493</u>	<u>316</u>
Liabilities			
Creditors: Amounts falling due within one year	34	25	59
Net current assets/(liabilities)	<u>(211)</u>	<u>468</u>	<u>257</u>
Net assets	<u>757</u>	<u>555</u>	<u>1,312</u>
Funds of the Charity			
Income funds:			
Restricted	-	555	555
Unrestricted	757	-	757
Total funds	<u>757</u>	<u>555</u>	<u>1,312</u>



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OxfordHealthCharity



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