



Summary Information Return 2007 (Online)

Summary Information Return 2007 Of Aims, Activities and Achievements

This return is intended to comprise a Summary of key information contained in the Annual Trustee's Report and Accounts and in other documents

WILLOW FOUNDATION

Charity Number: 1106746

Submission Deadline 31/11/2007

This online version of the form shows the information you have entered through Annual Return 2007 Online and has been designed to make it easier for Charities to print.

This Summary Information Return is DRAFT and has not been submitted

Question 1 - The Charity's Aims

What are your charity's aims?

The Willow Foundation is a national charity that offers quality of life and quality of time for seriously ill young adults aged 16 to 40 through the provision of special day experiences.

The aim of the Charity is to offer time out from treatment and allow young adults, their family and friends to spend quality time together.

Further details can be obtained from

www.willowfoundation.org.uk

Question 2 - Who benefits?

Who benefits from the charities work?

Young adults aged 16 to 40 living in the UK with life-threatening medical conditions.

How do you respond to their needs and how do they influence the charity's developments?

Every special day is individually tailored to the recipient's wishes and every effort is made to ensure a stress-free, seamless day where expectations are not just met but exceeded.

The Charity has appointed a Beneficiaries' Committee to oversee the interests and views of special day recipients and their families.

A former recipient is represented on the Board of Trustees.

A Recipients' Forum has been introduced on the Charity's website which is open to any recipient or family member to post their views and comments on the Charity's service.

Evaluation questionnaires for each recipient and their medical professional have been developed and will be trialled during 2008.

Further details can be obtained from

www.willowfoundation.org.uk

Question 3 - The Charity's Strategy

What are the key elements of your charity's medium to long term strategy?

- Establish and sustain the capacity to respond to 2,500 special day applications per annum by 2012.
- Continue to raise the public awareness of the Charity, resulting in special day applications that better reflect the demographic spread of the young adult population.
- Continue to review supporting systems to maintain and improve quality and control and minimise the risk of waste, fraud and error.
- Build on current fundraising momentum to secure the long-term future of the Charity, balancing this with long-term reserves requirements.

How does your charity measure the success of the strategy?

By setting annual objectives and reviewing performance against these objectives.

Further details can be obtained from

Trustees' Annual Report and Accounts for 2007.

Question 4 - The Charity's Objectives and Achievements

What were your charity's main annual objectives and were they achieved?

Objective	Achievement
Provide the capacity to meet the potential for 1,400 special day applications.	1,533 applications were received resulting in 1,054 special days. This 29% increase in applications was responded to with only one more special day co-ordinator.
Improve the diversity of applications by building relationships with referring organisations other than those that are cancer related.	Promotional visits took place at regional renal and cystic fibrosis units across the North and Midlands. This resulted in a four fold increase in applications from those with cystic fibrosis and a two fold increase from those with organ failure.
Encourage applications from under-represented regions. At the beginning of 2007, the North East, West Midlands and Scotland were identified as the under-represented regions.	A roadshow took place in Newcastle in April 2007. Applications from the North East rose more than threefold during the year. Increased medical and promotional activity in Scotland and the West Midlands almost doubled applications from these regions.
Establish a Development Board of supporters to assist with fundraising.	The Development Board was established in April 2007 and raised more than £700,000 in 2007. The Board has also helped source tickets for special days at sold out events.

Question 5 - The Charity's Income and Expenditure

What were your charity's sources of income in the year?

Income Source	% of incoming resources	£ 000s
Voluntary Income	56	1,954
Activities for generating funds	41	1,431
Investment income	3	88
Incoming resources from charitable activities	0	0
Other Incoming Resources	0	0
Total	100	3,472

What were your charity's most significant activities during the year and how much did you spend on them?

Charitable Activities	£ 000s
Provision of Special Days	1,665
-	0
-	0
Other	0
Total expenditure on Charitable Activities	1,665
Total Expenditure	2,602
Explanatory Comments	
This year saw further growth in the demand for special days and the number provided exceeded 1,000 for the first time. The average cost per day is £1,600. Keeping fundraising at 2006 levels would not be sufficient to fund Charitable Activities in 2007. Fundraising needed to respond. The Charity has no guaranteed funding and part of the growth in income came from fundraising events. These raised £1.4m but cost £562,000 to organise.	

What were your charity's three main fundraising activities in the year and how much did each generate and cost?

Fundraising Activity	Income generated	Cost of Activity £ 000s
Fundraising events	1,410	562
Community fundraising and third party events	710	72
Individual donations	426	24
Other	838	183
Total voluntary income and activities for generating funds	3,384	
Total cost of generating voluntary income and fundraising		841
Explanatory Comments		
In 2007, the Willow Foundation spent 14p to raise every £1 of voluntary income, 6p less than in 2006. An increase in fundraising was planned to provide funding for the continued growth in charitable activities. However, expectations were exceeded due to the success of the Development Board and fundraising events.		

Further details can be obtained from

Trustees' annual report and accounts 2007

Question 6 - The Charity's Financial Health

How would you describe your charity's financial health at the end of the period?

The Trustees believe that the Charity's financial health is strong, appropriate to a charity which continues to grow rapidly and provides a foundation to achieve the ultimate vision of offering a special day to every seriously ill young adult in the UK (estimated by the University of Hertfordshire to be in excess of 12,500 people each year).

Further details can be obtained from

Trustees' annual report 2007

Question 7 - The Next Year

How will the overall performance last year affect your charity's medium to long term performance?

The demand for the Charity's service has grown more than fivefold in the past four years which resulted in a deficit in 2006. The subsequent investment in fundraising more than doubled the amount raised in any previous year.

The resulting surplus has been invested in a Development Fund, managed by a professional fund manager, which will be used to meet the long term growth strategy to meet untapped demand and progress the vision of offering a special day to every seriously ill young adult in the UK.

What are your charity's main objectives for next year?

Provide the capacity to meet the potential for 1,700 special day applications without further significant recruitment by introducing greater efficiency savings.

Devise a method of ongoing evaluation to measure the impact of special days by collecting and analysing the new questionnaires.

Improve in-house HR expertise with training and utilisation of professional support.

Improve systems of donor care & maintenance by reviewing the contact database.

Further details can be obtained from

Trustees' annual report 2007

Question 8 - The Charity's Governance

How does the charity ensure that its governance arrangements are appropriate and effective?

The Steering Committee, a sub-committee of Trustees, meets quarterly to review the Charity's governance arrangements, using Charity Commission guidance to establish best practice.

Further details can be obtained from

Trustees' annual report 2007

DECLARATION

This return has not been submitted and no Declaration has been made