

Willow Tree

England & Wales · Charity number 1142508

Details

Other names	WILLOW TREE GARDEN
Status	Registered
Legal form	Other
Registered	2011-06-21
Register	View on the Charity Commission register

Contact

Address	246 High Street Gorleston Great Yarmouth NR31 6RT
Phone	01493302975
Email	willowtreegarden@ntlworld.com
Website	http://willowtreegarden.cfsites.org/

Activities

Objects: (1) THE RELIEF OF PEOPLE WITH ANY FORM OF PHYSICAL OR LEARNING DISABILITY IN OR VISITING, NORFOLK AND SUFFOLK (THE AREA OF BENEFIT) THROUGH THE PROVISION OF SUPPORT, EXERCISE, EDUCATION, RECREATION, RESPITE, HOLIDAYS AND PRACTICAL ADVICE WITH THE OBJECT OF IMPROVING THEIR CONDITIONS OF LIFE.(2) TO DEVELOP THE CAPACITY AND SKILLS OF PEOPLE WITH ANY FORM OF PHYSICAL OR LEARNING DISABILITY IN THE AREA OF BENEFIT IN SUCH A WAY THAT THEY ARE BETTER ABLE TO IDENTIFY, AND HELP MEET, THEIR NEEDS AND TO PARTICIPATE MORE FULLY IN SOCIETY.

Activities: Willow Tree provides disabled people with a practical scheme where learners take part in a range of activities; catering, fitness, dog training, DIY skills including furniture restoration. Growing vegetables and taking part in healthy living and exercise thus improving their quality of life, level of fitness and reducing their isolation, hence increasing their sense of purpose and value.

Classification

- **How:** Provides Buildings/facilities/open Space, Provides Services, Provides Advocacy/advice/information
- **What:** General Charitable Purposes, Education/training, The Advancement Of Health Or Saving Of Lives, Disability, Economic/community Development/employment, Recreation
- **Who:** People With Disabilities

Geography

- Norfolk
- Suffolk

Finances

Period end	Income	Expenditure	Assets	Employees
2025-03-31	£108,157	£205,071	-	-
2024-03-31	£89,351	£87,586	-	-
2023-03-31	£106,239	£111,748	-	-
2022-03-31	£106,239	£111,748	-	-
2021-03-31	£172,120	£155,855	-	-

Trustees

Name	Role	Appointed
Dr Clare Winter	Chair	2009-05-01
Claire Quinn		2021-10-21
Dr HEATHER SAYER		2011-04-01
Gordon Smith		2015-01-01
Mechelle Roderick		2017-04-14
Rachael Down		2020-02-23

Willow Tree

England & Wales - Charity number 1142508

Accounts

Willow Tree Trustees Report

March 23 –March 24

The charity continues to cater for a very special group of learners in the local area;

The learners work on all of the following in an integrated way

- Financial skills
- Cooking
- Planning recipes
- Budgeting
- Calorie calculations
- Communication skills
- Money handling
- Health and safety and risk assessments
- Memory games
- Social interaction methods and practice
- Listening and memory skills
- Carpentry

The aided a student to produce an art display as part of her degree course. This involved a great deal of planning, work and pride in the outcome of their efforts. The student passed! This display was held in the local church in Great Yarmouth and allowed the learners to show their skill in a new environment

Willow Tree has a charity shop on the local high street which allows the learners to be involved in creating displays and to sort and order the donations. They are also handling the advice to customers on the availability of stock and learning how to restock the shelves

The carpentry and craft workshop is popular and allows some members to get the satisfaction to see a restored piece of furniture that they have been responsible for.

We are a happy bunch and learn to work together and listen to everybody's needs.

Willow Tree Accounts

Charity no. 1142508

Statement of Income & Expenditure for the year ended 31st March 2024

Income and Expenditure Account

Receipts

Grants	£35702.00
Donations	£13010.00
Holiday/respice	£16615.07
Dog School & Learner fees	£ 8177.45
Sales	£ 4543.42
Misc/Gift aid	£11304.85
Transfer in from another WT account	£18803.98

Income £108156.77

Payments

New Projects	£45306.93
Light & Heat	£2964.72
Water	£579.35
Insurance	£1475.87
Cost of workshops	£0
Training	£0
Wages	£13195.20
Stationary	£0
Animal costs	£2182.95
Misc costs	£1981.84

£87585.94

Income - expenditure	£20570.83
Petty cash	
Total	£20570.83

Statement of Assets & Liabilities for the year ended 31st March 2024

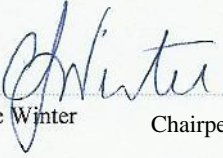
Funds

Opening balance 01.04.2023	£59129.58
+/- Income – Expenditure	<u>£20570.83</u>
Total	£79700.41 Closing balance 31.03.2024

Bank and cash balances as of 31st March 2024

WTA – Barclays Acc no.50284041	£608.37
WTB – Barclays Acc no. 10752657	£8511.09
WTF – Barclays Acc no. 10927481	£250.00
WTG - Barclays Acc no. 40067407	£19288.83
WTN - Barclays Acc no. 40933392	£10896.43
WTR – Barclays Acc no. 10752657	£5501.91
WTS – Barclays Acc no. 90579459	£15796.51
WTT – Barclays Acc no. 80198005	£12398.82
WTV – Barclays Acc no. 30451231	£0
WTW – Barclays Acc no. 40964603	£6448.45
Total	£ 79700.41

Signed:



Clare Winter Chairperson



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Willow Tree

**On accounts for the year
ended**

31st March 2024

**Charity no
(if any)**

1142508

Set out on pages

Willow Tree Accounts Pages 1 & 2

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 March 2024

**Responsibilities and
basis of report**

As the charity's trustees, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

**Independent
examiner's statement**

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination (other than that disclosed below *) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

** Please delete the words in the brackets if they do not apply.*

Signed:

Date:

21 October 2024

Name:

Anthony A R Moore

**Relevant professional
qualification(s) or body
(if any):**

Address:

Boarded Barn Farm

Ormesby St. Margaret

Great Yarmouth
NR29 3QH

Section B

Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

[Empty box for disclosure details]

Willow Tree

England & Wales - Charity number 1142508

Accounts

Willow Tree Trustees Report

March 23 –March 24

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The learners work on all of the following in an integrated way

- Financial skills
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Willow Tree Accounts

Charity no. 1142508

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Income £108156.77

Payments

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Wages	£13195.20
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Income - expenditure	£20570.83
Petty cash	
Total	£20570.83

Statement of Assets & Liabilities for the year ended 31st March 2024

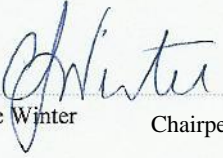
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WTT – Barclays Acc no. 80198005	£12398.82
WTV – Barclays Acc no. 30451231	£0
WTW – Barclays Acc no. 40964603	£6448.45
Total	£ 79700.41

Signed:



Clare Winter Chairperson



Section A

Independent Examiner's Report

**Report to the trustees/
members of**

Willow Tree

**On accounts for the year
ended**

31st March 2024

**Charity no
(if any)**

1142508

Set out on pages

Willow Tree Accounts Pages 1 & 2

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- the accounts did not accord with the accounting records; or
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** Please delete the words in the brackets if they do not apply.*

Signed:

Date:

21 October 2024

Name:

Anthony A R Moore

**Relevant professional
qualification(s) or body
(if any):**

Address:

Boarded Barn Farm

Ormesby St. Margaret

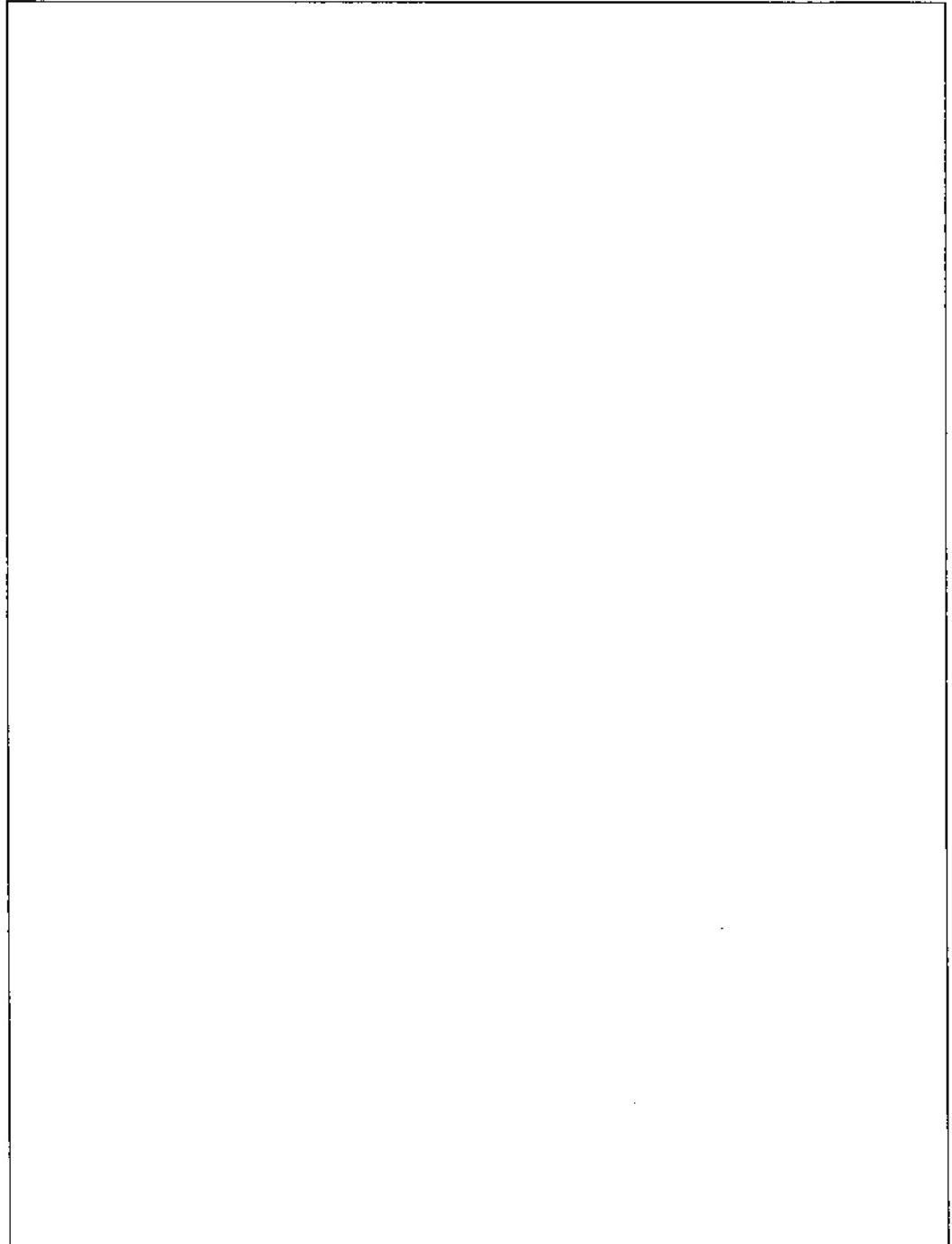
Great Yarmouth
NR29 3QH

Section B

Disclosure

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Give here brief details of any items that the examiner wishes to disclose.



Willow Tree

England & Wales - Charity number 1142508

Accounts

Willow Tree Accounts

Charity no. 1142508

Statement of Assets & Liabilities for the year ended 31st March 2022

Funds

Opening balance 01.04.2021	£41576.76
Closing balance 31.03.2022	£36066.32
Total	- £5510.44

Bank and cash balances

WTB – Barclays Acc no. 10752657	£4536.09	Reserves under £5000
WTG - Barclays Acc no. 40067407	£2013.30	Reserves under £5000
WTN - Barclays Acc no. 40933392	£6046.66	Reserves £5000 Unrestricted £1046.66
WTS – Barclays Acc no. 90579459	£11842.36	Reserves £5000 Restricted £3000 Unrestricted £3842.36
WTT – Barclays Acc no. 80198005	£6660.35	Reserves £5000 Unrestricted £ 660.35
WTW – Barclays Acc no. 40964603	£4967.25	Reserves under £5000
Total	£36066.01	

Due to the unprecedented times of the Covid-19 pandemic , WTB, WTG, and WTW fell under the reserve threshold. However, the trustees agreed to these actions.

These accounts are a true record of the financial accounts of Willow Tree Charity no. 1142508 for 1st April 2021 to 31st March 2022.

Signed:


Clare Winter Chairperson

Willow Tree Accounts

Charity no. 1142508

**Statement of
Income &
Expenditure for the
year ended 31st
March 2022**

Income and Expenditure Account

Receipts

Grants	£79697.00
Donations	£17137.39
Rentals	£7831.22
Dog School Fees	£1160.5
Learner fees	£413.00

£ 106239.11

Payments

New Projects	£49554.18
Consultancy and planning	£864
Maintenance & repair	£0
Light & Heat	£3195.06
Water	£1154.59
Insurance	£5051.71
Cost of workshops	£0
Training	£0
Wages	£50826.33
Stationary	£0
Animal costs	£0
Misc costs	£1102.18

£111748.05

Income - expenditure	- £5508.94
Petty cash	£1.50
Total	£5510.44



Section A Independent Examiner's Report

Report to the trustees/ members of

Charity Name Willow Tree

On accounts for the year ended

31st March 2022 Charity no (if any) 1142508

Set out on pages

Appendix 1 Appendix 1

Responsibilities and basis of report

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Independent examiner's statement

[The charity's gross income exceeded £250,000 and I am qualified to undertake the examination by being a qualified member of [insert name of applicable listed body]]. Delete [] if not applicable.

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* Please delete the words in the brackets if they do not apply.

Signed: [Signature]

Date: 05 September 2022

Name: Anthony A R Moore

Relevant professional qualification(s) or body

[Empty box for qualification]

(if any):

Address:

Section B Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

None

Willow Tree

England & Wales - Charity number 1142508

Accounts

Willow Tree Accounts

Charity no. 1142508

Statement of Assets & Liabilities for the year ended 31st March 2022

Funds

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Clare Winter Chairperson

Willow Tree Accounts

Charity no. 1142508

**Statement of
Income &
Expenditure for the
year ended 31st
March 2022**

Income and Expenditure Account

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Training	£0
Wages	£50826.33
Stationary	£0
Animal costs	£0
Misc costs	£1102.18

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Income - expenditure	- £5508.94
Petty cash	£1.50
Total	£5510.44



Section A Independent Examiner's Report

Report to the trustees/ members of

Charity Name Willow Tree

On accounts for the year ended

31st March 2022 Charity no (if any) 1142508

Set out on pages

Appendix 1 Appendix 1

Responsibilities and basis of report

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* Please delete the words in the brackets if they do not apply.

Signed: [Signature]

Date: 05 September 2022

Name: Anthony A R Moore

Relevant professional qualification(s) or body

[Empty box for qualification]

(if any):

Address:

Section B Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

None

Willow Tree

England & Wales - Charity number 1142508

Accounts

Willow Tree Trustees Report 2021

Another great year for Willow Tree despite the lockdown. The Willow Tree Charity now consists of the Willow Tree Tuns which is running very successfully as a catering centre where the learners are increasing their catering skills as well as working out the costs and the choices for healthy food. They have also provided community lunches doing a great job with their presentation and waiting skills.

The DIY centre in Great Yarmouth; Willow Tree Works is a hive of activity with learners creating beautiful craft items and diligently sanding down furniture in order to restore items to their former glory. If they are offered a machine to sand the items they politely decline and carry on patiently working by hand which is really the better way! They rate at which they work and the standard of their products needed an outlet....hence the need for the next and current restoration project: Willow Tree Stores.

Willow Tree Stores was the largest build and restoration we have ever taken on. The shop was an old florists and the building was in a poor state of repair. We have not quite finished the restoration but hope to be open in the next few weeks. The shop will provide a venue to sell their furniture and crafts along with a few donated items and clothing. The plan is that the learners will further develop their communication, management of stock and money handling. Customers will be welcome if they are patient and allow the learners time to gain confidence in working out costs and handling purchases. A steep learning curve for everyone including some customers! Willow Tree has a presence to now meet with the public.

Willow Tree has also developed a sustainable arm to the charity by creating respite and holiday homes for people who need special facilities in a place where the whole family can relax and enjoy themselves as everyone is catered for in a beautiful seaside town of Gorleston.

We are grateful for the financial support we receive from granting bodies and local people. Willow Tree is going from strength to strength with new supportive branches (no pruning necessary).

Sorry this report is so short we are still incredibly busy!!

Clare Winter
Chairperson



Section A

Independent Examiner's Report

Report to the trustees/ members of	Willow Tree		
On accounts for the year ended	31st March 2021	Charity no (if any)	1142508
Set out on pages	Appendix 1		

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2021

**Responsibilities and
basis of report**

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

** Please delete the words in the brackets if they do not apply.*

Signed:  Date: 25th August 2021

Name: Anthony A R Moore

Relevant professional qualification(s) or body (if any):

Address: Boarded Barn Farm

Ormesby St. Margaret, Great Yarmouth

NR29 3QH

Section B

Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

Not Applicable

Willow Tree Accounts

Charity no. 1142508

**Statement of
Income &
Expenditure
for the year
ended 31st
March 2021**

Income and Expenditure Account

Receipts

Grants	£111,031.70
Donations	£16,449.83
Rentals	£4838.96
Transfer in	£39,800.00
	£172120.49

Payments

New Projects	£83209.10
Consultancy and planning	£0
Maintenance & repair	£292.30
Light & Heat	£3252.81
Water	£1,666.91
Insurance	£2015.63
Cost of workshops	£511.58
Training	£39.95
Wages	£22658.00
Stationary	£60.5
Animal costs	£759.43
Misc costs	£1588.95
Transfer out	£39,800.00
	£155855.16

£16265.33

Willow Tree Accounts

Charity no. 1142508

Statement of Assets & Liabilities for the year ended 31st March 2021

Funds

Opening balance 01.04.2020	£25339.48
Closing balance 31.03.2021	£41604.76
Total	£16265.28

Please note 5p less due to spreadsheet rounding

Bank and cash balances

WTB – Barclays Acc no. 10752657	£5280.64	Reserves £5000	Unrestricted £280.64
WTG - Barclays Acc no. 40067407	£17280.33	Reserves £5000	Unrestricted £12280.33
WTN - Barclays Acc no. 40933392	£5271.42	Reserves £5000	Unrestricted £271.42
WTS – Barclays Acc no. 90579459	£1776.10	Reserves £1776.10	
WTT – Barclays Acc no. 80198005	£5637.90	Reserves £5000	Unrestricted £637.90
WTW – Barclays Acc no. 40964603	£6358.37	Reserves £5000	Unrestricted £1358.37
Total	£41604.76		

These accounts are a true record of the financial accounts of Willow Tree Charity no. 1142508 for 1st April 2019 to 31st March 2021.

Signed:


Clare Winter Chairperson



Section A

Independent Examiner's Report

Report to the trustees/ members of	Willow Tree		
On accounts for the year ended	31st March 2021	Charity no (if any)	1142508
	Set out on pages Appendix 1		

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- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

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

** Please delete the words in the brackets if they do not apply.*

Signed: **Date:**

Name:

**Relevant professional
qualification(s) or body
(if any):**

Address:

Ormesby St. Margaret, Great Yarmouth

NR29 3QH

Section B

Disclosure

Only complete if the examiner needs to highlight material matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

Not Applicable

Willow Tree Accounts

Charity no. 1142508

**Statement of
Income &
Expenditure
for the year
ended 31st
March 2021**

Income and Expenditure Account

Receipts

Grants	£111,031.70
Donations	£16,449.83
Rentals	£4838.96
Transfer in	£39,800.00
	£172120.49

Payments

New Projects	£83209.10
Consultancy and planning	£0
Maintenance & repair	£292.30
Light & Heat	£3252.81
Water	£1,666.91
Insurance	£2015.63
Cost of workshops	£511.58
Training	£39.95
Wages	£22658.00
Stationary	£60.5
Animal costs	£759.43
Misc costs	£1588.95
Transfer out	£39,800.00
	£155855.16

£16265.33

Willow Tree Accounts

Charity no. 1142508

Statement of Assets & Liabilities for the year ended 31st March 2021

Funds

Opening balance 01.04.2020	£25339.48
Closing balance 31.03.2021	£41604.76
Total	£16265.28

Please note 5p less due to spreadsheet rounding

Bank and cash balances

WTB – Barclays Acc no. 10752657	£5280.64	Reserves £5000	Unrestricted £280.64
WTG - Barclays Acc no. 40067407	£17280.33	Reserves £5000	Unrestricted £12280.33
WTN - Barclays Acc no. 40933392	£5271.42	Reserves £5000	Unrestricted £271.42
WTS – Barclays Acc no. 90579459	£1776.10	Reserves £1776.10	
WTT – Barclays Acc no. 80198005	£5637.90	Reserves £5000	Unrestricted £637.90
WTW – Barclays Acc no. 40964603	£6358.37	Reserves £5000	Unrestricted £1358.37
Total	£41604.76		

These accounts are a true record of the financial accounts of Willow Tree Charity no. 1142508 for 1st April 2019 to 31st March 2021.

Signed:


Clare Winter Chairperson