# THE MATTHEW TREE PROJECT

England & Wales · Charity number 1146401

## Details

| | |
|---|---|
| **Other names** | TMTP |
| **Status** | Registered |
| **Legal form** | Charitable company |
| **Company number** | 07324296 |
| **Registered** | 2012-03-15 |
| **Register** | View on the Charity Commission register |

## Contact

| | |
|---|---|
| **Address** | Btg Begbies Traynor (Central) Llp<br>Levelq Sheraton House<br>2a Surtees Way<br>Surtees Business Park<br>Stockton-On-Tees<br>TS18 3HR |
| **Phone** | 01642796640 |
| **Email** | TEESIDE@BTGUK.COM |

## Activities

**Objects:** THE CHARITY'S OBJECT IS SPECIFICALLY RESTRICTED TO THE FOLLOWING FOR THE PUBLIC BENEFIT:- TO RELIEVE FINANCIAL HARDSHIP AMONGST PEOPLE OF ALL AGES IN THE LOCAL COMMUNITIES IN ACCORDANCE WITH A CHRISTIAN ETHOS.

**Activities:** TMTP is a unique model; is a UK based strategic citywide holistic pioneering work addressing the underlying causes of poverty; improving health; connecting communities and improving the prospects of those living in the UK's most deprived communities by way of being a catalyst for the increased provision of skills training and the creating of jobs for the long term unemployed.

Downloaded from opencharities.uk/ew/1146401

## Classification

- **How:** Makes Grants To Individuals, Provides Human Resources, Provides Buildings/facilities/open Space, Provides Services, Provides Advocacy/advice/information, Sponsors Or Undertakes Research, Acts As An Umbrella Or Resource Body, Other Charitable Activities
- **What:** General Charitable Purposes, Education/training, The Advancement Of Health Or Saving Of Lives, The Prevention Or Relief Of Poverty, Economic/community Development/employment, Recreation
- **Who:** Children/young People, Elderly/old People, People Of A Particular Ethnic Or Racial Origin, Other Charities Or Voluntary Bodies, The General Public/mankind

## Geography

- Throughout England And Wales

## Finances

| Period end | Income | Expenditure | Assets | Employees |
|---|---|---|---|---|
| 2024-12-31 | £208,240 | £229,959 | - | - |
| 2023-12-31 | £310,045 | £272,981 | - | - |
| 2022-12-31 | £307,717 | £392,363 | - | - |
| 2021-12-31 | £625,644 | £659,329 | £348,562 | 10 |
| 2020-12-31 | £989,302 | £845,530 | £382,247 | 9 |

## Trustees

| Name | Role | Appointed |
|---|---|---|
| Colin Michael Sainsbury | | 2021-08-06 |
| Jonathan David Evans | | 2018-07-22 |
| NIGEL JOHN GOODWAY | | 2011-09-30 |
| Roger John Wooldridge | | 2017-03-30 |
| Susan Roberta Brooks | | 2024-04-09 |
| Tina Jane Hammond | | 2024-04-09 |

Downloaded from opencharities.uk/ew/1146401

**THE MATTHEW TREE PROJECT**

England & Wales - Charity number 1146401

# Accounts

**Imagine a world set free of poverty.**

**Where no child goes hungry, and every person has the chance to thrive.**

We believe in that world.

A world where everyone has enough. Where life expectancy isn't defined by postcode, and every human being can live with dignity and hope.

This is the world we are fighting for – every single day.

And with your help, we believe it is possible.

# ANNUAL REPORT FOR THE YEAR ENDED 31 DECEMBER 2024

The Matthew Tree Project®

SOUTH WEST ENGLAND PRESTIGE AWARDS
The Matthew Tree Project
2024/25 WINNER
Crisis Support NPO of the Year

LIVING WAGE EMPLOYER

Registered charity number: 1146401

## Contents


**OFFICERS AND PROFESSIONAL ADVISORS** ..... 4

**REPORT OF THE TRUSTEES** ..... 5

**STRUCTURE, GOVERNANCE AND MANAGEMENT** ..... 5

**RISK MANAGEMENT** ..... 6

**OBJECTIVES AND ACTIVITIES FOR THE PUBLIC BENEFIT** ..... 6

**RESULTS FOR THE YEAR** ..... 6

**RESERVES POLICY** ..... 6

**GOING CONCERN** ..... 6

**ORGANISATION OVERVIEW, AIMS & OBJECTIVES** ..... 7

**WHAT WE DO & HOW WE DO IT** ..... 8

Rebuilding Lives: Holistic, Person-Centred, Empowering ..... 8

Preventing Homelessness (cross-sector cost sharing model) ..... 8

How We Work: Integrated, Evidence-Driven and Human ..... 8

A Holistic Ecosystem of Support ..... 9

New and Emerging Services in 2025-2028 ..... 9

Expanding Impact through Partnership and Enterprise ..... 10

Clinical & Systems Partnerships ..... 10

**CASE STUDIES:** ..... 11

Homelessness ..... 11

At risk of losing job & health ..... 13

Cost of living / Child poverty ..... 17

Domestic abuse / Homelessness ..... 19

Debt / Housing / Health / Child poverty ..... 21

**DAILY AND WEEKLY ACTIVITIES** ..... 25

COMMUNITY PLUS, 49b Filwood Broadway ..... 25

One-2-One Weekly Support Package Elements: ..... 26

Specialist Services, introduced as required include (funded separately): ..... 26

**COMMUNITY PLUS GROUP ACTIVITIES** ..... 27

Cook & Connect - Nutrition & Cooking Skills ..... 27

Urban food growing site (using organic principles) ..... 28

Citizen Voice Group & Co-production ..... 28

Food Appeal Collections ..... 30




© The Matthew Tree Project 2025

Children's Christmas Present Appeal ..... 30
Community Meals ..... 30
Community Engagement Events. ..... 31
Training Centre & Administration Offices ..... 31
**MONITORING, EVALUATION & IMPACT** ..... 32
Financial wellbeing – average increase in disposable income ..... 32
No-one slips through the gaps ..... 32
Referral organisations can check case status of referred clients ..... 32
External independent evaluation ..... 32
**THEORY OF CHANGE: CASE MANAGEMENT AND REPORTING** ..... 33
**REBUILDING LIVES 2024 Factsheet** ..... 34
**HIGHER LEVEL OUTCOMES & CHANGE INDICATORS** ..... 36
**SETTING AND ACHIEVING PERSONAL GOALS** ..... 37
**RELATED PARTIES: RISE SOCIAL ENTERPRISE** ..... 38
RISE Social Enterprise – Strengthening Long-Term Sustainability ..... 38
**AWARDS** ..... 40
**NATIONAL RECOGNITION** ..... 41
**TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS** ..... 44
**INDEPENDENT EXAMINERS REPORT** ..... 45
**FINANCIAL ACCOUNTS 2024** ..... 46
**APPENDIX A: ORGANISATIONAL RESILIENCE PLAN (2024 – 2026)** ..... 55



© The Matthew Tree Project 2025

## OFFICERS AND PROFESSIONAL ADVISORS

TRUSTEES who have served during the year and up until the date of signing the report are:
Nigel Goodway, Roger Wooldridge, Jonathan Evans, Colin Sainsbury, Susan Brooks, Tina Hammond.

### INDEPENDENT MANAGEMENT ADVISOR

Anstey Barton Consulting
Huntsham
Tiverton
EX16 7NG

### INDEPENDENT HR ADVISOR

BrightHR
Peninsula Consulting
Victoria Place
Manchester M4 4FB

### FINANCE OFFICER

Sue McQuaid
Libra Accounting Services Ltd
54 Petherton Gardens
Hengrove, Bristol BS14 9BS

### INDEPENDENT SAFEGUARDING ADVISOR

Thirtyeight:one
PO Box 133, Swanley
Kent
BR8 7UQ

### BANKERS

HSBC Bank plc
431 Oxford Street
London
W1C 2DA

### INSURERS

Zurich Insurance plc
The Zurich Centre
3000 Parkway
Whiteley, Fareham PO15 7JZ

### PRINCIPAL & REGISTERED OFFICE OF THE CHARITY

Community Support Hub
10 Filwood Broadway
Knowle
Bristol
BS4 1JL

### ADMIN & TRAINING CENTRE

Ground Floor & 2nd Floor
Beech House, Brotherwood Court,
Almondsbury
South Gloucestershire
BS32 4QW

### INDEPENDENT ACCOUNTS EXAMINER

Andy Forse FMAAT
Causeway Accountancy
279 Lodge Causeway
Bristol BS16 3RA

### IMPACT MONITORING ADVISORS

Clarity CIC
The Old Bakery, Old Road
Harbertonford
Totnes TQ9 7TA

### apricot™ CASE MANAGEMENT SOFTWARE

Fully integrated bespoke case management and impact monitoring system designed on the APRICOT® software platform and underpinned by The Matthew Tree Project 'Theory of Change Framework'.



© The Matthew Tree Project 2025

## REPORT OF THE TRUSTEES

The Board of Trustees present their annual report and the independently examined financial statements for the year ended 31 December 2024. These are prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Trust Deed, 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) and Financial Reporting Standard 102 and the Companies Act 2006.

## STRUCTURE, GOVERNANCE AND MANAGEMENT

The Mathew Tree Project was established in July 2010 and is a registered charity, number 1146401. The charitable Trust is registered as a company limited by guarantee, as defined by the Companies Act 2006. The governing document is its Memorandum and Articles of Association and is registered in England (company number 7324296).

The Matthew Tree Project operates through a **unique, people-shaped governance model** — one that turns the conventional organisational structure upside down (diagram, right).

Rather than decisions being made at the top and passed down through layers of hierarchy, **TMTP's direction is led from the frontline upwards.** The people we serve — our clients — sit at the very top of our organisational model. Their needs, experiences, and aspirations drive everything we do.

Beneath them are our volunteers, many of whom are former clients themselves. They represent lived experience, empathy, and community ownership — ensuring that those closest to the issues help design the solutions.

Next come our staff teams, whose role is to listen deeply, understand each client's goals, and work collaboratively to make positive change happen. They translate client needs into action, coordinating the full range of TMTP's wrap-around services.

Supporting them are the management team, whose primary function is to enable and empower the frontline. Their task is not to dictate priorities but to remove barriers — ensuring that the people delivering and receiving support have the tools, training, and resources they need to succeed.

At the foundation of this model sit the Trustees, providing governance, accountability, and strategic oversight. The Board's role is to uphold the charity's purpose, safeguard its assets, and ensure that all operational activity aligns with TMTP's mission and values.

In this inverted structure, leadership is service-oriented: every level of the organisation exists to serve the one above it. Decisions flow from the realities of people's lives, not from policy papers. This approach ensures that TMTP remains responsive, compassionate, and authentically shaped by the community it serves — **a living example of "nothing about us, without us."**



© The Matthew Tree Project 2025

## RISK MANAGEMENT

The Trustees confirm that they regularly review the significant risks facing the Trust and have systems and procedures in place to mitigate those risks. The risk policy has adopted a risk mapping methodology that is applied to each identified risk, assessing the likelihood of it occurring and the severity of the impact of occurrence on the Trust.

## OBJECTIVES AND ACTIVITIES FOR THE PUBLIC BENEFIT

The Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission when exercising their powers and duties.

## RESULTS FOR THE YEAR

The charity received income for the year of £208,241 (2023: £310,045), including £57,788 (2023: £45,841) of food gifts and £933.81 (2023: £367.95) in hardship grants distributed to those in need. Expenditure for the year was £233,715 (2023: £272,981).

## RESERVES POLICY

The trustees aim to hold no more than £50,000 of free reserves. Any funds over this level are reinvested in the development of client services. At the end of the year, free reserves were £25,467, and at the end of 2023 free reserves were £25,998.

## GOING CONCERN

After making enquiries, the Trustees have a reasonable expectation that the Trust has adequate resources to continue its objectives and activities for the public benefit for the foreseeable future. Accordingly, they continue to adopt the going concern basis in preparing the annual report and financial statements.

Further details regarding the adoption of the going concern basis are in note 1 ‘Accounting Policies’ in the financial statements.



© The Matthew Tree Project 2025

## ORGANISATION OVERVIEW, AIMS & OBJECTIVES

The Matthew Tree Project's long-term vision is two-fold:

- Working holistically, to empower disadvantaged people to take control and live dignified, fulfilling, and self-sufficient lives.
- Engage with policy makers, locally and nationally, to effect systemic change and create a fairer and more equal society for the benefit of all, whereby poverty is eradicated from the United Kingdom once and for all.

Since 2010, The Matthew Tree Project has helped more than 15,000 people, across Bristol and South Gloucestershire, **escape a life of poverty whilst simultaneously improving their mental and physical wellbeing.** Our model – combining early intervention, advocacy, practical aid, and empowerment – delivers proven, lasting change.

The charity is fighting to eradicate poverty from the UK, one of the richest countries in the world. We have more wealth; more resources; more knowledge; more understanding than at any time in history. Yet still too many children grow up familiar with hunger, a cold home and exclusion from the norm of their peers. **We are giving children a troubled start to life and wonder why we end up with troubled communities that cost us a fortune in social and health care public services.**

Bristol is a prosperous city; but this prosperity is not shared by all. Poverty leads to health inequalities and results in a **shameful 9-year gap in life expectancy between those living in the richest and poorest wards.** We believe no-one's life expectancy and life chances should be curtailed by poverty. The work of the charity contributes towards this goal. We use the knowledge gained by working on the frontline to engage with national policymakers to effect systemic change where the system is failing.

> "We believe in a world where everyone has enough. Where life expectancy isn't defined by postcode, and every human being can live with dignity and hope.
>
> This is the world we are fighting for – every single day. And with your help, we believe it is possible.
>
> We don't just respond to poverty — we rebuild lives, restore dignity, and create pathways to a healthier, wealthier, happier future."
>
> **Mark Goodway MBE**
> **FOUNDER & CEO – THE MATTHEW TREE PROJECT**

© The Matthew Tree Project 2025

## WHAT WE DO & HOW WE DO IT

### Rebuilding Lives: Holistic, Person-Centred, Empowering

At the heart of The Matthew Tree Project is our *Rebuilding Lives Programme* — an award-winning holistic crisis-support and empowerment model that addresses the **root causes of poverty**, not just the symptoms.

We believe that **no one's life expectancy or life chances should be curtailed by poverty.**

Working from our Community Support Hub in Filwood, with additional capacity in Almondsbury and Brislington, we provide a complete, wrap-around system of care that meets people where they are — practically, emotionally, and socially. Each client receives a personally tailored "full support package" built around three pillars:

1. Immediate Relief: stabilising crisis (food, warmth, safety, debt, housing).
2. Substantive Change: resolving underlying causes (income maximisation, skills, wellbeing).
3. Transformational Change: rebuilding confidence, aspiration, independence, and hope.

No one is turned away. Support continues for as long as it's needed, and every client closes their own case when they don't need us anymore — a defining feature of our compassionate, empowering, human-centred approach.

### Preventing Homelessness (cross-sector cost sharing model)

A key feature of The Rebuilding Lives programme is early intervention to prevent homelessness (***Over 60%*** of clients are at medium or high risk of homelessness at the time of their referral to The Matthew Tree Project). Preventing homelessness is not just compassionate — it's economically smart.

This is a cross-sector cost sharing model. **TMTP catalysed a system-activating collaborative response that cost much less in total than the state's reactive response to homelessness.** With a total systems blended cost of just £4,268 per person (TMTP £196.25 + leveraged partner value of £4,072) **vs. cost to the state of £20,000+ to rehouse someone post-homelessness**, our approach offers commissioners, funders and local leaders a **scalable, cost-efficient 'leveraged social value' model** for early intervention and long-term impact (full 'blended partnership-based' cost analysis available on request).

TMTP's leadership combines deep lived experience, strategic insight, and innovation. Our founder, Mark Goodway MBE, is nationally recognised for his vision and advocacy. He is supported by an experienced management team and board, including experts in finance, social work, healthcare and local policy. We are collaborative, community-rooted, and impact-driven.

### How We Work: Integrated, Evidence-Driven and Human

Our strength lies in combining **practical help with relational support**. Clients work one-to-one with trained caseworkers to stabilise crisis and build sustainable futures, supported by:

- **Food Aid & Nutrition Support** – emergency food provision, meal planning, and *Cook & Connect* classes.



© The Matthew Tree Project 2025

- **Debt, Benefits & Financial Wellbeing** – budgeting support, advocacy, and access to grants or credit unions.
- **Mental Health & Emotional Support** – listening ear, counselling, and peer groups.
- **Warm Homes Project** – energy grants, insulation, and practical help to reduce costs.
- **Skills, Training & Volunteering** – confidence-building activities, volunteering, and accredited learning.
- **Employment & Work Coaching** – tailored coaching, CV and interview preparation, and employer engagement.
- **Urban Food Growing Site** – improving health, connection, and food sustainability.
- **Citizen Voice Group & Co-Production** – clients shaping services weekly through open forums.

Every interaction is recorded through our bespoke **case management system**, aligned with our *Theory of Change*, enabling us to track outcomes across mental health, financial stability, skills development, and wellbeing.

### A Holistic Ecosystem of Support

We understand poverty as multidimensional — affecting health, housing, income, family, and purpose. That's why our services are **joined-up, adaptive, and co-produced**. People rarely need just one intervention; they need a whole community around them. TMTP provides that community, ensuring **no one slips through the gaps.**

### New and Emerging Services in 2025-2028

#### 1. Early Years Family Support

A new specialised strand within *Rebuilding Lives* focuses on parents of 0–5-year-olds — tackling intergenerational poverty early designed to give every disadvantage child the same opportunities as their peers when they start school. This includes parenting confidence courses, nutrition and play sessions, and pathways to training or employment once children start school.

#### 2. AI Empowerment & Digital Inclusion

Launching in 2026, our *AI Empowerment Workshops* bridge the digital divide by teaching everyday AI skills for budgeting, job searches, and communication — turning digital exclusion into digital opportunity.

#### 3. Adult Empowerment & Employment Pathways

Building on our existing strengths, this strand provides financial coaching, life skills, and partnerships with local employers for flexible, family-friendly job opportunities.

#### 4. Youth Empowerment & Future Skills

Young people access to *AI & Tech Discovery Workshops*, mentorship, and skills mapping to prepare for modern careers. This connects them with apprenticeships, volunteering, and positive community engagement.



© The Matthew Tree Project 2025

**5. Community Plus**

An evolution of our Food Plus support model — blending practical aid with wrap-around help such as budgeting, cooking, and wellbeing drop-ins. Each hub becomes a space for *connection, learning, and mutual support.*

**6. Supporting Older Adults**

A new "Digital Buddies" and befriending initiative combats loneliness, improves health and wellbeing, and helps older people access services online, reconnecting them with their community and improving quality of life.

## Expanding Impact through Partnership and Enterprise

### SPERO – A Social Enterprise for Change

Through our wholly owned subsidiary, RISE Social Enterprise, we are launching the *SPERO Programme*: a paid wellbeing and crisis-support service for employers, based on our proven *Rebuilding Lives* methodology.

SPERO will generate unrestricted income for TMTP while providing compassionate, preventative support in workplaces — a social business with impact and heart (see page 38).

## Clinical & Systems Partnerships

Engaging with GP practices, NHS Integrated Care Systems, and local authorities to position ***Rebuilding Lives* as a non-clinical community health asset**. The programme's ability to reduce demand on health and social care makes it a natural partner in preventative commissioning.

**Our Difference**

- **Holistic:** treating people, not problems.
- **Empowering:** clients shape their own journey.
- **Preventative:** early intervention prevents homelessness and crisis escalation.
- **Data-driven:** robust measurement of outcomes through *Apricot* and external evaluation.
- **Collaborative:** trusted partnerships across the community, business, and public sectors.
- **Transformational:** turning hopelessness into hope — one life at a time.

> ***"We don't just respond to poverty — we rebuild lives, restore dignity, and create pathways to a healthier, wealthier, happier future."***



© The Matthew Tree Project 2025

## CASE STUDIES:

### Homelessness

| | |
|---|---|
| Referred by | Self-referral |
| Reason for referral | Homeless / Sofa Surfing |
| Situation | 'D' is a 47-year-old man, who had no fixed abode and was sofa surfing at his sister's home and sleeping on the sofa. This was very challenging because his sister has two young children, and her eldest child has Downs Syndrome with behavioural problems, is very disruptive and does not sleep, and is up for a lot of time during the night. As 'D' is on the sofa this is extremely detrimental to his health, and he does not sleep.<br><br>'D' first signed up for HomeChoice 15 years ago when his relationship broke down and he parted from his son's mother, and he had to leave the family home, leaving him homeless. Before finding a home of his own he entered a new relationship and moved in with his partner. This relationship broke down in 2023 and 'D' became very distressed and suffered a heart attack and is now on medication for life. He has been diagnosed with acute coronary syndrome, vascular respiratory disease, COPD and anxiety detachment.<br><br>'D's son suffers with Attention Deficit/Hyperactivity Disorder, (ADHD) and autistic Tourette's. His son is very unhappy living with his mother and her new partner and has expressed he wants to live with his father who he feels more comfortable with.<br><br>'D' initially asked Citizens Advice for help but did not get anywhere and then came to us in February 2024 upon the advice of a friend who was aware of The Matthew Tree Project. |
| What they needed | To find a home; emotional support; essential household items |
| What we did for them | Updated his home choice application, arranged an appointment with the homelessness prevention team at Bristol City Council. Liaised with BCC to further his application to assist with a quicker outcome. We |



© The Matthew Tree Project 2025

| | |
|---|---|
| | also helped with form filling and a BCC application form for a flat. Liaised with Credit Union and set up an application for a deposit scheme. Sourced household items and delivered them to D's new home as it was completely empty. |
| Outcome | D was successful in obtaining a credit union deposit scheme and a flat with BCC. D picked up the keys and moved in on 10 June 2024.<br>'D' is now going to be able to have his son to stay with him for long periods of time, with the long-term plan being, his son will live with him full time. |
| CLIENT QUOTE | *"When I first came to the Matthew Tree I was struggling with my health, unable to get a full night's sleep as I was on my sister's sofa which was exacerbating my anxiety, and I needed to use my GTN medication spray more frequently than I should and therefore needed to visit healthcare professionals often. My hospital consultant advised avoiding stressful situations as it was making my condition so much worse, which was impossible where I was living. I came to Matthew Tree for help with my housing situation, phone calls, applications and paperwork. I would like to thank them all for the AMAZING help I have received over the past few months from them.*<br>*I would and will recommend this supporting agency to family and friends. When I came first, I felt I was on a ladder going down and down, since coming I now for the first time in my life feel like I am going up the ladder. Thank you, Ladies, for all you have done for me. I will never forget you. D"* |



© The Matthew Tree Project 2025

## At risk of losing job & health

| | |
|---|---|
| Referred by | Self-Referral – his work colleague, at Bristol City Council, recommended he come to The Matthew Tree Project. |
| Reason for referral | Support for his PIP (personal independence payment) court appeal hearing before a judge, GP and DWP employee |
| Situation | M, a 49-year-old man, lives with his wife and teenage daughter who works in an outdoor role for Bristol City Council maintaining the parks and open spaces. M enjoys his job and working outdoors is very important for his mental health conditions. He is struggling with ill health, both physically and mentally. He has osteoarthritis, musculoskeletal connective tissue disorder, poor mental health - mixed anxiety, depression and Tourette's.<br><br>M was doing all he could to help himself. He was struggling to hold down his job working for BCC local authority due to his conditions even though, upon his request, his employer had granted him light duties, but even this was now proving too much for him. He struggled to get to work and was taking more and more sick days and annual leave to try to cover his absences. He had no life outside work, his wife was now preparing all his meals, helping him to bathe and trying to keep the house running because M couldn't do anything when he returned home from work, and he often just went straight to bed due to chronic fatigue and the pain he was suffering. In addition to his poor physical health, he was also battling poor mental health but wanted to try to remain in employment for his family, his dignity and his overall wellbeing. His wife had to accompany him to all his medical appointments because his anxiety and poor cognitive memory function meant he could not retain anything health professionals said to him.<br><br>M had made an application to the DWP for PIP so he could stay in employment at reduced hours. M's initial PIP application and mandatory reconsideration were both rejected with zero points, so M requested to appeal the decision in front of a judge in court. M needed help preparing for and attending the PIP appeal court hearing.<br><br>M was at the end of his tether and didn't know where to turn. He had tried several places for help, including Citizens Advice Bureau, but no |

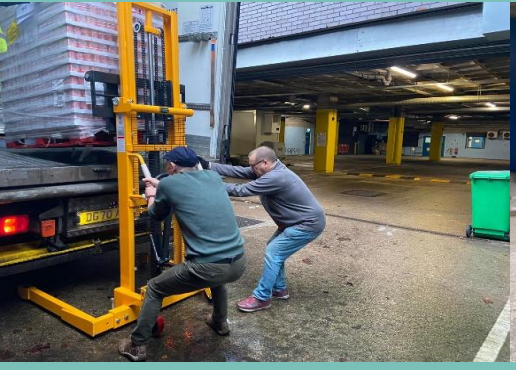


© The Matthew Tree Project 2025

| | |
|---|---|
| | one could help him. He desperately needed the extra income from PIP to allow him to live a normal life. He was no longer capable to work full time.<br><br>M had been waiting since April 2023 and finally a date for a telephone court appeal hearing was scheduled for the end of June 2024. He was very anxious about the appeal and needed considerable help preparing for and attending it. |
| What they needed | Support and a need to feel that someone cared about his situation. Help preparing for the hearing, advocacy and support on the day of the PIP appeal court hearing. |
| What we did for them | M came in every week with his wife in the lead up to his telephone court hearing for support and preparation of all his paperwork, we also worked through his application decision paperwork from DWP, as he disagreed with all their decisions. He frequently got quite anxious as he was very nervous about the PIP appeal phone call.<br><br>We advocated and supported M during the PIP court appeal hearing. Present at the appeal hearing was a judge, and the doctor and DWP staff member who had made the original decision to deny M his PIP application. During the appeal hearing M experienced high levels of anxiety and required frequent breaks because of this. Our advocacy involvement enabled the judge to understand what was happening and ensured the hearing was not aborted. |
| Outcome | M won his appeal and will now receive full Personal Independence Payment (PIP). This will allow him to reduce his hours at work and buy up extra holiday if needed to allow further days off work to recover from days worked. This is a just decision that should have been made at the outset but due to the systemic failure of our welfare system process, often people are forced to go through gruelling experiences like this to receive what they are legally entitled to. Sadly, all too often, many people are unable to.<br><br>This is just one example of the type of case evidence The Matthew Tree Project use to highlight systemic failure with governmental policy makers in the hope that others do not have to go through the same in justice. |
| Client Quote | *"My wife and I are so grateful to you all, when I first came into The Matthew Tree Project, I didn't have anywhere else to turn, I had tried lots of organisations who said they couldn't help me. I was desperate and felt so alone and that no one cared, and I was very anxious about my PIP hearing. You immediately put me at ease, and I felt welcomed, safe and understood. Without you I wouldn't have made it through the hearing phone call, as it was, I had to keep leaving the room but having you by my side explaining to the judge I needed to take a breather was the reason I believe I was finally awarded PIP. Thank you all so much."* |



© The Matthew Tree Project 2025



**Youth unemployment**

| | |
|---|---|
| Referred by | Self-Referral – son of single mum who was a client of TMTP |
| Reason for referral | School leaver unable to find employment |
| Situation | TH first encountered The Matthew Tree Project when his single mum was a client of our Rebuilding Lives programme, struggling on low income and unable to cover household bills. TH had left school and was enrolled in a scheme based at Bristol City Football in which he was learning media studies. He then finished the scheme at BCFC and was feeling lost, unable to get a job and bored at home. |
| What we did for them & outcome | His mother was now volunteering with The Matthew Tree Project on a regular basis and asked if TH could volunteer as well. TH started volunteering aged 17 years old in 2019, at our supermarket food appeals which involved approaching shoppers as they entered the store and asking them for food donations. In 2020 when Covid hit, our services upscaled overnight and we needed all the help we could get at our food distribution warehouse. TH started to come on a regular basis and very quickly became an integral part of the food distribution team. He assisted the drivers and regularly went out on home deliveries to our clients; the drivers were always very happy when they were teamed with TH and often commented on what a hard worker he was. He also interacted well with clients on the deliveries and represented TMTP well. During this time, we noticed TH grew in confidence and skills set. In addition to drivers' mate, he also worked closely with the warehouse supervisor and assisted within the warehouse, putting client food orders together, loading and offloading vehicles, stacking shelves and cleaning. Then a paid cleaning job role became available, and he was successful in securing part time employment with us as the warehouse cleaner.<br><br>As well as working part time for us he also continued volunteering daily. TH's confidence went from strength to strength and in 2021 he was successful in securing a full-time warehouse position in Avonmouth, which is on the other side of Bristol to where TH lives in Filwood. TH says it was due to the skills and confidence he gained whilst with TMTP that enabled him to get the job. |



© The Matthew Tree Project 2025

| | |
|---|---|
| | TH has 4 siblings and lived with his single mother in one of the poorest wards in Bristol, where gaining employment is incredibly difficult. Securing his full-time position allowed him to be able to save money and he was able to move out of the family home and now lives independently, close to his new employment. He has also travelled abroad for the first time on his own and is loving life. |
| Client Quote | *"I worked and volunteered with The Matthew Tree Project for a few years and really enjoyed my time. I learnt skills like packing, unloading products, which helped me get into warehouse work when lockdown ended. I also had experience learning to work with and alongside others. The skills I learnt in this time helped me settle nicely into my new job as I already had all the experience gained that opened the door to new job opportunities. It was a good stepping stone for me and taught me skills I'd have to learn quickly in a warehouse environment and would have struggled if I had gone straight into warehouse work."* |



© The Matthew Tree Project 2025

**Cost of living / Child poverty**

| | |
|---|---|
| Reason for referral | Cost of Living / Loss of Job |
| Referred by | Self-referral |
| Situation | Family of 6; 2 adults and 4 children, aged, 9y, 10y, 14y, and 17y. ‘D’ self-referred herself and her family to us to in May 2023, she had lost her part time job, due to ill health. She is suffering from severe Chron’s disease, anaemia, chronic fatigue and is under investigation for heart problems. Her husband is working on a self-employed basis, but on a very low income and has also had some health issues and had to take some weeks off work. He does not get paid when off work. Since ‘D’ left her job and with the cost-of-living crisis rising they found it very impossible to pay basic household bills and buy food and their debts were rising significantly. |
| What they needed | Food Aid, help with energy bills, PIP application, emotional support, advice and practical help with severe damp and mould in her property. Help with a large water debt of £984. Help writing letters to employer, applications and form filling. |



© The Matthew Tree Project 2025

| | |
|---|---|
| What we did for them | • We supported 'D' with food aid and advocating with other organisations on her behalf.<br>• Completed a PIP application and a DLA (disability living allowance) application for her 9yr old son who suffers with Tourette's syndrome.<br>• Applied for energy vouchers.<br>• Purchased a dehumidifier to help with the damp and mould to aid better health living conditions.<br>• Purchased energy saving lightbulbs and radiator insulation to reduce energy bills.<br>• Made application for 'Assist and Restart Scheme' with Bristol Water. |
| Outcome | PIP awarded. Energy vouchers awarded, dehumidifier has completely improved the damp and mould in her home, and she said she has noticed a significant difference. Assist and Restart Scheme with Bristol Water put in place; she now has a plan with them, paying £1.00 a month for 2 years after which the debt will be written off. |
| Comment | *"I don't know what I would have done without The Matthew Tree Project, you have helped me so much with everything, I am very grateful for all your help, and the food has enabled me to make meals for my family. Having assistance with my debts, and applications has helped us so much, we were under so much stress before coming and didn't know where to turn. Thank you to all the team."* |



© The Matthew Tree Project 2025

**Domestic abuse / Homelessness**

| | |
|---|---|
| Reason for referral | Domestic violence<br>Homeless |
| Referred by | Self-referral |
| Situation | ‘E’ fled domestic violence and was staying with her daughter, but due to continual arguments the relationship with her daughter broke down. She became scared for her safety and fled the daughters’ home that caused her to become homeless. She is being treated for mental health conditions by Avon and Wiltshire Mental Health Partnership NHS Trust having been diagnosed with bipolar, PTSD, and extreme anxiety. ‘A’ was admitted into hospital after an episode caused by her situation. When she was discharged from hospital, she had no option but to live and sleep in her car. She went to BCC and was placed under the homeless prevention team. After spending the day at the council offices, she was sent in the evening to temporary accommodation, which was in extremely poor condition, and she must share the house with 4 other women. She was really scared and was left to get on with it which caused her mental health and anxiety to escalate to a very dangerous level.<br>She contacted us and said she had no one else to help her. She also has a 16-year-old son, who she is not able to have with her at the temporary |



© The Matthew Tree Project 2025

| | |
|---|---|
| | accommodation. 'A' needs accommodation suitable for them to live together. She has been on the waiting list for over a month with Missing Link domestic abuse service but has still not been contacted. |
| What they needed | Emotional Support, food aid, form filling, liaising and advocating with other organisations. She had been trying to liaise with her housing officer who repeatedly did not respond to her. |
| What we are doing for them | Liaising with BCC regarding her temporary housing. Providing food aid, gifts for her child and grandchildren, household goods, pans, cutlery, bedding and clothes. |
| Outstanding | Continuing to liaise with BCC to help 'E' move to a permanent safe and secure home. |
| Outcome | 'E' does not feel alone anymore which has helped her mental health condition. We are continuing to build a trusting relationship with E, she says she feels safe coming to us. |
| Comment | *"I don't think I would be here without your help; you are the ones that have done more for me than anyone else, I can't thank you enough, without you my son would not have his mother now. I do not go anywhere other than to come to you, as I feel so anxious to even leave the room. Thank you for offering me a safe and supporting place where I feel I can trust you and feel comfortable to come to, and for all the practical help as well, I didn't have any food, anything to cook in or eat with and you have helped so much with that and for your ongoing help with dealing with BCC. You are so wonderful" x* |



© The Matthew Tree Project 2025

**Debt / Housing / Health / Child poverty**

| | |
|---|---|
| Reason for referral | Unmanageable debt / housing / child poverty |
| Referred by | Missing Link |
| Situation | ‘P’ is a mother to 2 small children: 5yr & 6 yr old boys.<br>She fled domestic violence in December (2022) and was housed in temporary accommodation for a year. This has now become a permanent home. The house is very damp with significant mould, broken doors, and lack of insultation. ‘P’ suffers with fibromyalgia and severe trauma and mental health due to the domestic violence. Her 6-year-old son is severely autistic and has been diagnosed with SLOS (Smith-Lemli-Opitz Syndrome).<br>Even though Bristol City Council housed the family in a 3-bedroom property due to her son’s illness /condition, she has been forced to pay bedroom tax for one of the bedrooms since moving in.<br>Her sons need separate bedrooms due to her 6-year-olds condition as this significantly disrupts her other son.<br>Her sons DLA (disability living allowance) was stopped because ‘P’ was late with her renewal application due to her mental health/capacity. This is now being appealed against. |



© The Matthew Tree Project 2025

| | |
|---|---|
| | In addition, her violent ex-partner took out a £6,000 loan and put 'P' as guarantor. The loan has not been paid and 'P' is now being chased by the debt collection agency. |
| What is needed | • Help with unmanageable debt.<br>• Help to make the home accessible due to health and disability conditions. |
| What we are doing for 'P' | • Contacted debt agency and are working with our partner, Step Change, regarding the outstanding loan debt.<br>• Contact BCC to get adaptions and repairs completed to the property, including a walk-in shower, and ramp to the property to enable 'P' to use her mobility scooter. BCC has agreed to carry out the works, but to date have not completed. Continuing contact.<br>• Regular food aid.<br>• Provided radiator insulation (all radiators are situated on walls that are external), a dehumidifier to assist with the damp & mould, door draught excluders and an electric blanket for 'P' to use to keep heating costs down. |
| Comment | *"Thanks for helping us, I struggle to talk on the phone to the council as I don't think they care or want to listen. I do get angry and having you ring on my behalf I feel will really help with everything. The food is helping enormously and the things you have given me to help with energy and the home are helping so much. Thank you."* |

## KEY ATTRITUBES OF THE REBUILDING LIVES CRISIS SUPPORT PROGRAMME

The attributes of the Holistic Crisis Support Programme - **Rebuilding Lives**, are:

**Holistic Tripartite**: The foundation of the charity is the unique Rebuilding Lives programme. A Truly Holistic Tripartite Crisis Support Programme addressing the multiple and complex underlying causes as well as the symptoms of poverty, characterised by the treatment of the whole person, considering 1) mental, 2) physical, and 3) social factors.

**In-depth programme:** where long-term relationships are cultivated. Not a helpline, one-off activities, drop-in only, or signposting to other services. Building trust, and in addition to stabilising the initial crisis, provide the next stage in longer-term support, with a plan which helps people to positively move on out of poverty.

**Person-centred service:** Recognising that as a single charity it is not possible to meet all the needs of the people we support; working hard to build trusted strategic partnerships with providers or agencies who can help people to overcome the challenges they face and meet their basic needs. Referring clients for support, whilst continuing to track progress, ensuring their needs are being addressed.

**Empowering people to develop and achieve Personal Plans:** Working together to understand the challenges people are experiencing and agreeing with them how to find a way to overcome the issues they have. Keeping electronic records and case files of each person supported, noting progress against activities and being able to demonstrate the difference being made through these records.

**Shaped by the people it serves:** At the heart of this ***innovative award-winning multi-agency social mobility change model***, are the people it supports, empowered and in control of their unique journey. Rebuilding Lives positively impacts self-confidence, self-worth, self-esteem and converts hopelessness into hope and belief that a healthier, happier, wealthier future is possible and worth fighting for.

**Personally tailored 'full support package':** The Rebuilding Lives programme works hard to bring a wide range of ***expertly joined-up service elements together to create a unique and personally tailored 'full support package'*** around each vulnerable household in the programme. Identifying challenges people may be experiencing and agree with them, how to find a way to overcome the issues they have.

**Open Monday-Friday:** The Rebuilding Lives Programme is delivered from the charity's ***Community Support Hub in Filwood***, one of the UK's top 1.5% deprived wards. Reducing isolation by bringing people together in a safe and socially vibrant environment, to help themselves, each other, and engage positively within the wider community where they live.



© The Matthew Tree Project 2025

**Remote support available:** Remote support by phoneline is provided for those who are housebound or unable to travel to the Holistic Crisis Support Hub in Filwood. This makes the Rebuilding Lives programme available and accessible to anyone in need regardless of post code, creating a city-wide service.

**Open to all:** no one is excluded from access to the Rebuilding Lives programme regardless of age, gender, ethnicity, post code, disability, religious belief, or sexual orientation. Anyone in crisis will receive the help they need. This affords the charity a unique insight into the poverty drivers across the board spectrum of society as we do not only support one category of people or issue.



© The Matthew Tree Project 2025

## DAILY AND WEEKLY ACTIVITIES

### COMMUNITY PLUS, 49b Filwood Broadway

The Rebuilding Lives Programme is delivered from the charity's **Community Support Hub located in the very heart of the Filwood community (BS4 1JN),** open Monday to Friday is where the food aid is distributed, group sessions happen and one2one support sessions take place where next steps are agreed and required actions implemented. If someone is unable to come in person, because of sickness, or distance, for example, then we provide telephone crisis support to discuss the pressing issues and next step actions.

In addition to providing community engagement and holistic crisis support, the programme reduces isolation by bringing people together in a safe and socially vibrant environment, to help themselves, each other, and engage positively within the wider community where they live.

Filwood, one of the country's **most disadvantaged communities is in the top 1.5% of most deprived neighbourhoods in the UK, has one of the highest levels of obesity (60.1%), child poverty (25.3%), 58.3% are claiming unemployment related benefits and only 2.4% have above average mental wellbeing**. Poverty results in major health and social issues that are damaging for our citizens, costly for government and create a negative cycle from generation to generation.



© The Matthew Tree Project 2025

We receive referrals from a wide range of statutory and non-statutory organisations and accept self-referral. This often happens when an existing client or ex-client tells someone they know to be struggling of their positive experience within the programme.

The Rebuilding Lives Programme provides a range of activities, driven by client needs as determined by them:

**One-2-One Weekly Support Package Elements:**

- Diagnosis & understanding of underlying causes & barriers to progress
- Advocacy
- Befriending
- Nutritional wellbeing (food & nutritional screening)
- Free internet access
- Free phone charging points
- Support filling out forms, understanding & replying to letters.
- Listening ear/emotional support
- Accompanied appointments, hearings, assessments.
- Volunteering opportunities (to build confidence and learn new skills)
- Activities in support of addiction recovery
- Social interaction/inclusion
- Provision of essential household items (white/brown goods) grants
- Provision of crisis grants to (a) pay off debt such as energy arrears; and (b) emergency payments to turn the gas/electric meter back on
- Christmas presents (client's children)
- Transition/exit to independence support

**Specialist Services, introduced as required include (funded separately):**

- Early Years
- Counselling
- Advice
- Financial wellbeing
- Skills training
- Securing Employment
- Warm Homes Project
- Children's Essentials
- Digital inclusion

The Matthew Tree Project Holistic Crisis Support Hub is open Monday to Friday for clients to come depending upon their needs and circumstances. Every client is different, every client case is different and because of this a key feature of the Rebuilding Lives Programme is that it adapts to create a uniquely tailored package of end-to-end joined-up support around each vulnerable household.



© The Matthew Tree Project 2025

## COMMUNITY PLUS GROUP ACTIVITIES

- Citizen Voice Group
- ‘Cook & Connect’ cooking & nutrition classes
- Food Growing
- Food Appeal Collections
- Community Engagement Events
- Children’s Christmas Present Appeal
- Community Meal Celebrations

### Cook & Connect - Nutrition & Cooking Skills

The class is held at The Matthew Tree Project’s training kitchen in Filwood and covers nutrition, food storage / how to reduce food waste at home, healthy eating and cooking. The course aims to be fun, informative and to give the participants some useful practical skills. All the food cooked at each session can be eaten for lunch at the course or taken away for an evening meal.

Community cooking classes focus on:

- Affordable, healthy meals
- Batch cooking and meal planning
- Nutrition education for families and people living alone
- “Cook together” events to build social connections.



© The Matthew Tree Project 2025

## Urban food growing site (using organic principles)

Wednesday is the food growing site volunteering and training day. The Matthew Tree Project run an urban food growing site in Brislington, Bristol (pictured below). The food grown is added to the food stocks of the charity to be distributed to vulnerable households who are unable to afford to eat properly. Food is grown using organic principles and clients receive food growing training, positive outdoor engagement with others (feeling part of a team and social interaction), and the sense of making a positive contribution towards the work of the charity.

## Citizen Voice Group & Co-production

Thursday (Community Support Hub) is when the Citizen Voice Group come together to discuss what challenges people are facing and what changes, if any, should be made to the Rebuilding Lives Programme. This is open to all clients to be part of – no-one is excluded. It is also a 'social' time where lunch is served, and people mingle. Many new friendships derive out of the time people spend together and it is due to the Citizen Voice Group that for the coming year the Rebuilding Lives Programme has been enhanced to where more time and expertise is devoted into helping people address the underlying causes of their crisis and removal of barriers to progress.



© The Matthew Tree Project 2025

Co-production is central to the development of the 'Rebuilding Lives' social change model: creating priorities, language, and approaches among all those involved.

People with lived experience (clients and ex-clients; some staff; and some volunteers) work alongside everyone else, those employed and the volunteers within The Matthew Tree Project to shape every aspect of the programme: bringing a wealth and diversity of empathy and experience to our planning, practical development, and external communications.

Co-production within the 'Rebuilding Lives Support Programme' works on two levels:

- micro-level in terms of the individually tailored support each client case receives.
- macro-level in terms of the organisation and the scope of services provided.

Examples of co-production within the 'Rebuilding Lives' programme:

- people who use services co-facilitating the programme's service delivery to others
- everyone who use services are given multiple avenues, informal and formal, to input and shape services (for themselves and for others) at every point of engagement with the programme – at least once a week. These include but is not restricted to informal chit-chat in the social communal spaces; anonymous 'Comment Book' publicly available at all times; formal interview; citizen voice group which runs every Thursday and is open to all current and ex-clients.
- creating change through the sharing of experiences with the 'community' created within the programme, which bring together a wide spectrum of diverse peoples, with wide and diverse experiences and knowledge, enabling anyone to contribute to making a real difference to their community by way of helping others to improve their well-being, their circumstances and live well.
- giving autonomy to the service delivery team to do whatever is required to meet the needs of each client case - needs as determined by the client themselves.
- all clients close their own case which means each client can receive support from the programme for as long as they feel they need it.
- all clients choose their own food.

The key characteristics of co-production within The Matthew Tree Project are:

- Ensuring everyone involved in the project understands what co-production is and why it is so important. It is at the heart and soul of the DNA of the organisation.
- Training all team members to 'capture' and 'record' all relevant client comment, no matter how informal as we have found it's the informal conversations that are the most valuable of all.
- Co-produce project goals to ensure that they represent the aspirations of our clients.
- Ensuring our goal setting is flexible to adapt and change over time. Work towards them determinedly but being flexible about the methods – co-production throws up more creative and inclusive solutions than cannot be predicted at the outset.
- Co-production is about creating new, more resourceful solutions, not just finding the middle ground. We strive for the 'best' and most 'effective' solutions and are not tempted by the 'path of least resistance' approach.
- The needs of our clients take priority over the needs of the organisation.



© The Matthew Tree Project 2025

- Ensuring we have the right people involved. If specific skills, experience, or characteristics are needed, we are transparent about this.
- We recognise we will never achieve perfect co-production, but we strive for it anyway!

**Food Appeal Collections** happen monthly in partnership with ASDA. This is where a team will ask shoppers, as they enter the store, to buy an extra item or two and pop it into our basket when they leave. This is a great source of food supplies and serves to publicly raise awareness of the issue of local poverty. Often conversations that take place during this activity can lead to new people volunteering or financially supporting the work of the charity.

**Children's Christmas Present Appeal** Every December the charity works in partnership with several large employers in Bristol to ensure all the children being supported by the programme receive at least one brand new gift to open on Christmas Day. We provide a list of our children to each partner employer with the age and sex of the child. Employees who choose to support the appeal pick one child and purchase a brand-new gift for that child for £10-£15 in value. Then, one evening in December we invite all those who have contributed by purchasing a gift to join the team for music and mince pies whilst wrapping all the gifts ready to be delivered to each vulnerable household before Christmas Day. Over 250 children benefited from this activity last Christmas.

**Community Meals** every December the charity works in partnership with one employer in Bristol to provide a Community Meal Celebration. This is always a wonderfully joyous occasion where many isolated and lonely people come together to enjoy, what for them will be their one and only festive feast of the Christmas season.

© The Matthew Tree Project 2025

**Community Engagement Events.** At various points through the year, we organise community engagement events that are fun and encourage people to come together. In previous years we have put on Spring Fayre's and November 5th firework display and BBQ's. This year we ran a 'Name the Bear' Easter Competition that was aimed at the children in the community, many of whom walk past our Community Support Hub on their way to school. The Bear was displayed centre stage in our window and the children would come in to enter the name they choose for him/her. We then put on a buffet style food event to select the winning name, lucky dip style. Other prizes were donated by local businesses so that we were able to have multiple winners. The whole event was extremely popular.

## Training Centre & Administration Offices

In addition to the Community Support Hub in Filwood and the urban food growing site in Brislington, The Matthew Tree Project also lease the ground floor and second floor of Beech House in Almondsbury, South Gloucestershire. This is where the administration offices, training centre and board room is located.

© The Matthew Tree Project 2025

## MONITORING, EVALUATION & IMPACT

Since 2017 we have been in the process of designing and implementing a bespoke case measurement and evaluation software system based on the industry sector leading platform 'Apricot'. Importantly the software is user friendly, customisable to our unique work and is designed to improve our data collection methodology, understanding of our work and improve our service support provision to our client group.

Apricot offers several 'sector firsts' in the way clients are supported.

### Financial wellbeing – average increase in disposable income

Clients supported by TMTP's financial wellbeing and casework teams achieved sustained weekly income increases averaging £50–£60 — notably higher than national benchmarks for single-issue interventions — reflecting the depth, duration, and holistic nature of our approach.

### No-one slips through the gaps

All new clients are referred online via our highly secure, encrypted Apricot 'refer client' interface. For the first time we will have visibility of everyone who has been referred to the 'Rebuilding Lives' programme and at the end of each week, those who have been referred but have not turned up for support are being contacted to see if we can help them overcome whatever barriers may be holding them back from attending.

### Referral organisations can check case status of referred clients

Each referral organisation has a unique log-in name and password which provides them with access to a list of all the clients they have referred to the programme and the current status of each case. For the first time referral organisations have access to impact information because of their referral, which will help in the accurate reporting of medium to long-term impact and outcomes to their funders and supporters.

Apricot offers a wide range of reporting options so the quality of information will be better. This is a very large and challenging piece of work and additional funding for the expertise required to fully implement and then manage the IT system network and software has been secured so that we are able to maximise Apricot's considerable potential.

We use quantitative and qualitative data to measure the effectiveness and impact of our work and get this information directly from our beneficiaries.

### External independent evaluation

The Matthew Tree Project appointed Clarity Clear Solutions for Social Purpose Organisations (Clarity CIC), a registered Community Interest Company No 09147860 with their registered Office in



© The Matthew Tree Project 2025

Okehampton, Devon to undertake 'Theory of Change' evaluation of our work and make proposals for improvement.

Formed in 2014, Clarity Clear Solutions for Social Purpose Organisations CIC is a non-profit company limited by guarantee. Clarity provides a skilled resource for the sector, helping organisations solve everyday issues, building resources and adding capacity.

## THEORY OF CHANGE: CASE MANAGEMENT AND REPORTING

As we work with clients, we record any positive or negative change they tell us about and place it within the context of our ***'Theory of Change & Social Impact Measurement Framework'*** which underpins the 'Rebuilding Lives Support Programme'.

If a client tells us, for example, that their benefits are now in payment we would record a positive outcome for the payments and also another for the fact their financial situation has improved. By classifying these two positive changes and mapping them to the Theory of Change outcome groups we arrive at a count of positive change outcomes which measures the impact of our work with each client.

So, the client's benefit payment success will count towards 'Reduced Material Deprivation' and also 'Increased feeling of being in control of money/budget' as well as some Theory of Change measures.

Some of the outcomes in the Theory of Change Framework can occur frequently, such as the client having a more positive outlook or feeling happier, others will mostly be one-time changes such as moving to better accommodation.

Over the course of the last 7 years the 'Rebuilding Lives Support Programme' have designed a bespoke online case management software system based on the Apricot platform. Impact data is being collected at every interaction the client has with the programme. The case management system enables us to understand and improve the level of support provided and report on the impact of the programme to stakeholders and policy makers.

**6 higher level outcomes of the 'Rebuilding Lives' Programme':**

- People feel safe and more secure.
- People have support networks and feel connected.
- People have new or improved skills.
- People have improved health and wellbeing.
- People have improved resilience.
- People have hoper and a purpose.



© The Matthew Tree Project 2025

## REBUILDING LIVES 2024 Factsheet

| Measure | 2024 |
|---|---|
| | |
| Number of unique beneficiaries | |
| Adults | 54.6% |
| Children | 45.4% |
| | |
| Case load: Number of people being supported at 01/01/2024 | 196 |
| Case load: Number of people being supported at 31/12/2024 | 233 |
| Case load: Increase/(decrease) in demand | +18.8% |
| | |
| Single person households | 53.8% |
| Families | 46.2% |
| | |
| Number of unique people supported during the period (2024) | 1459 |
| Projected number of unique people supported for the year ahead (2024) | 1652 |
| | |
| Location of client households | |
| Number of households supported in the period - total (2024) | 559 |
| Number of households - BS1 | 5 |
| Number of households - BS2 | 5 |
| Number of households - BS3 | 11 |
| Number of households - BS4 | 412 |
| Number of households - BS5 | 23 |
| Number of households - BS8 | 5 |
| Number of households - BS10 | 5 |
| Number of households - BS13 | 49 |
| Number of households - BS14 | 23 |
| Number of households - BS15 | 6 |
| Number of households - BS16 | 10 |
| Number of households - BS30 | 5 |
| *NB: clients from outside of the immediate Filwood BS4 area tell us that they choose to travel to The Matthew Tree Project for support because they cannot find any other similar programme local to where they live* | |
| | |
| Average length of support provided (in weeks) | |
| Across all cases | 36.2 |
| | |
| Isolation | |
| Number of clients without any other form of support | 62.6% |
| | |



© The Matthew Tree Project 2025

| Measure | 2024 |
|---|---|
| | |
| Client age groups | |
| 16 - 25 | 9.0% |
| 26 - 40 | 38.5% |
| 41 - 60 | 42.1% |
| 61 + | 10.4% |
| Unknown | 0% |
| | |
| Client employment status | |
| Casual labour | 0% |
| Employed full-time | 1.1% |
| Employed part-time | 9.3% |
| Employed zero-hour contract | 1.3% |
| Unpaid Maternity leave | 0% |
| Retired | 3.2% |
| Self-employed | 2.2% |
| Student | 0.9% |
| Unable to work – childcare/carer | 14.1% |
| Unable to work - health | 48.2% |
| Unable to work – Asylum/Immigration status | 3.2% |
| Unemployed | 27.9% |
| Unknown | 5.0% |
| | |
| Client risk of homelessness | |
| None | 10.0% |
| Low (but possible) | 26.1% |
| Medium/High | 63.9% |
| *Note: of all the clients at risk of homelessness over 90% were kept in housing.* | |
| What clients tell us they need support with | |
| Mental Health | 43% |
| Physical Health | 28% |
| Addiction | 19% |
| Benefit Issues | 31% |
| Debt | 63% |
| Legal issues | 5% |
| | |
| Overall, how would you rate the support you received from TMTP? (% - 7 out of 10 or higher) | 98.7% |
| | |
| Client Goals showing some progress or achieved | 74.9% |



© The Matthew Tree Project 2025

## HIGHER LEVEL OUTCOMES & CHANGE INDICATORS

*Sample size: 215 households (416 people) – who have been supported for over 6 weeks.*

| | | |
|---|---|---|
| People feel safe and more secure | Reduced material deprivation | 97.9% |
| | Reduced fear of homelessness | 48.1% |
| | More able to move from insecure living spaces | 17.6% |
| | Increased feeling of empowerment to protect personal safety | 29.0% |
| | Increased feeling of being in control of money/budget | 54.0% |
| | More trusting and open to help | 77.8% |
| | Increased feeling of safety | 32.2% |
| People have support networks and feel connected | Increased feeling of being connected to a network of supportive agencies and organisations | 77.9% |
| | Increased awareness that there are people there to help | 75.1% |
| | Feeling of being part of a community who know & care for you | 42.0% |
| | Reduced feelings of social isolation | 51.7% |
| | Broader social groups | 39.0% |
| | Better links with family | 10.9% |
| | Improved family relationship | 16.8% |
| | More able to access specialist services | 72.3% |
| | Take part in volunteering | 31.5% |
| People have improved resilience | Understanding and acknowledgment of root cause/issues | 54.1% |
| | Increased self-sufficiency | 31.3% |
| | Increased level of engagement | 55.5% |
| | Increased confidence | 47.7% |
| | Improved control over own life choices | 36.1% |
| | Less negative feelings (anger/resentment) | 51.7% |
| People have new and improved skills | Increased skills in being work ready | 29.6% |
| | Increased ability to grow own food and develop cooking skills | 45.9% |
| | Better able at working as part of a team | 23.4% |
| | Ability to budget | 47.6% |
| | Develop new skills to be able to earn a living | 18.7% |
| People have improved health and wellbeing | Increased access to healthy foods | 98.3% |
| | Decreased malnutrition | 96.1% |
| | Improved physical health | 93.4% |
| | Improved healthy weight levels | 33.9% |
| | Improved mental wellbeing | 99.3% |
| | Improved sports skills/active lifestyle | 32.1% |
| | Better able to access food and nutritional help | 100.0% |
| | Better eating habits and diet | 100.0% |
| | Enhanced and wider food experience | 93.6% |
| People have hope and purpose | Increased aspirations | 36.8% |
| | Better able to cope/stabilise crisis | 66.4% |
| | Improved self-belief | 34.5% |
| | Improved independence and resilience | 38.6% |



© The Matthew Tree Project 2025

Our clients tell us they feel happier, calmer, manage stress better, have increased self-sufficiency, improved independence and resilience, increased aspirations, feel more confident, better able to build positive relationships. They say they engage more in the community where they live, parents say their children perform better at school, they manage money better, are better able to work as part of a team, stay in recovery, and are better able to secure and hold down a job.

## SETTING AND ACHIEVING PERSONAL GOALS

We encourage clients to set personal goals for themselves and then we provide support to enable the goals to be achieved. It is not for us to tell people what they should do or strive for, rather we work hard to empower each client to be in control of their journey through the programme and create the life they want. We know our intervention is successful by the change that occurs within each client's life. Avoiding eviction; resolving debt; getting and holding down a job; maximising benefit income; reducing household expenditure; improved and better relationships; better housing conditions; increased self-confidence and self-esteem; learning new life skills (managing money better; cooking from scratch at home; food growing; Improved English language; IT skills); eating better and more healthily; improved mental health; staying in recovery from addiction; 42% of clients with children say school performance of their children improves since being in the programme.



© The Matthew Tree Project 2025

## RELATED PARTIES: RISE SOCIAL ENTERPRISE

The reason The Matthew Tree Project was established in 2010 is to:

"To relieve financial hardship amongst all peoples of all ages in the local communities in accordance with a Christian ethos whilst contributing towards the eradication of poverty in the UK, once and for all."

RISE Social Enterprise has been established in the furtherance of this objective.

The Matthew Tree Project wholly own Rise Social Enterprise Limited, a company limited by shares number 10740064. See WWW.RISESOCIALENTERPRISE.CO.UK for more information.

RISE SOCIAL ENTERPRISE was established in 2017 and is a wholly owned subsidiary of The Matthew Tree Project (www.the-matthew-tree-project.org), registered in England at Companies House, number 10740064.

RISE Social Enterprise objectives are to:

- Contribute towards the objects of The Matthew Tree Project and ethos of early intervention – currently we get people walking through the door after everything has fallen apart, the RISE initiative seeks to connect with people BEFORE it all falls apart.
- Contribute towards the financial sustainability of The Matthew Tree Project by generating an annual surplus of funds to be given to the charity as a new income stream of unrestricted funding.

**RISE Social Enterprise – Strengthening Long-Term Sustainability**

RISE Social Enterprise was originally created by The Matthew Tree Project (TMTP) in 2017 to build a trading arm that could both advance TMTP's social mission and generate unrestricted income. As with many social enterprises, the journey has not been linear. The pandemic, supply-chain shocks, and post-COVID funding pressures meant RISE's initial food-based model could not be fully realised.

In 2025, the RISE business model was completely re-engineered. RISE is now preparing to launch the *SPERO Programme* — a paid wellbeing and crisis-support service for employers that commercialises TMTP's proven *Rebuilding Lives* model. This new plan requires minimal capital investment, is immediately scalable, and aligns directly with our charitable purpose of early intervention and poverty prevention.



© The Matthew Tree Project 2025

What is the 'SPERO Programme'?

SPERO is the commercialised version of 'Rebuilding Lives' rebranded to resonate with local employers, who will pay a monthly subscription of circa. £100/£200/£300 (subscription rate subject to number of employees) per month to be in the programme, and then the employee pays an employer subsidised additional fee when support is provided. The rationale behind this initiative is that a significant number of employees are struggling in silence with very stressful and difficult issues, i.e. relationship breakdown, unmanageable debt, addiction, mental health issues, physical health issues, that are negatively impacting work performance and quality of life. The initiative fits with the TMTP ethos of early intervention – currently we get people walking through the door after everything has fallen apart, the SPERO programme seeks to connect with people BEFORE it all falls apart.

The attraction of being in the SPERO programme to the employer are:

- Higher productivity
- Less sick days lost
- Higher staff retention
- Happier workforce (positive morale)

Once trading profitably, TMTP will have access to a fund of unrestricted income that can be drawn down by the charity with no tax implications. Far from being a liability, RISE represents a future pipeline of unrestricted, sustainable income and a strategic asset that strengthens TMTP's resilience and independence from grant dependency.



© The Matthew Tree Project 2025

## AWARDS

The work of the charity with its central and unique empowering 'Rebuilding Lives Crisis Support' model continues to win awards and receive national and international praise and recognition, which include:

- Bristol Prestige Award for **'Best in Charitable Community Services'** 2020
- Bristol Prestige Award for **'Best in Charitable Community Services'** 2021/22
- AI Non-profit Organisation Award **'Most Empowering Crisis Support Programme'** 2023
- **Global Award** for '**Crisis Support NPO of the Year'** 2023/24
- South West England Prestige Award for **'Crisis Support NPO of the Year'** 2023/24
- South West England Prestige Award for **'Crisis Support NPO of the Year'** 2024/25 (pictured left).



© The Matthew Tree Project 2025

## NATIONAL RECOGNITION

### 📰 Media Coverage & Recognition

1. **BBC News – MBE Recognition (Bristol Post)**
   🔗 https://www.bristolpost.co.uk/news/bristol-news/marks-tireless-commitment-eradicating-poverty-8525997
2. **CEO Outlook Magazine – Top 20 Visionary CEOs 2024**
   🔗 https://ceooutlookmagazine.com/mark-goodway-ceo-the-matthew-tree-project/
3. **Prestige Awards – Best Crisis Support NPO Interview**
   🔗 https://prestigeawards.co.uk/an-interview-with-mark-goodway-on-changing-the-lives-of-bristols-homeless-and-disadvantaged/
4. **Acquisition International – Best Crisis Support Programme 2024**
   🔗 https://www.acquisition-international.com/winners/the-matthew-tree-project-2/

---

### 🎙️ Broadcast Media

5. **BBC Radio 4 – *Costing the Earth* (2014): The Future of Our Food**
   🎧 https://www.bbc.co.uk/sounds/play/b03ynt6k
   (Interviewed Mark Goodway in relation to Bristol's Green Capital campaign)
6. **BBC One – *Panorama: Hungry Britain – Feeding the Crisis***
   📺 https://www.youtube.com/watch?v=NKVPwdNVb4s
   (Note: This is a YouTube link, which may be restricted on Wikipedia)
7. **BBC Inside Out West – "Mark Goodway: A Man on a Mission" (2012)**
   📺 https://www.youtube.com/watch?v=IQ50IWQTOog
8. **ITV News Interview**
   📺 https://www.youtube.com/watch?v=XEDDQ9w9sjI
9. **Al Jazeera:**
   📺 https://www.aljazeera.com/programmes/countingthecost/2014/12/left-behind-economic-recovery-20141281317509675 20.html

---



© The Matthew Tree Project 2025

### Print Journalism

9. **The Guardian – "We Hate to Be Called a Food Bank"**
   https://www.theguardian.com/society/2013/jun/18/hate-called-food-bank

10. **Bristol Post**, featuring Mark Goodway: (https://www.bristolpost.co.uk/news/bristol-news/marks-tireless-commitment-eradicating-poverty-8525997

---

### Public Speaking, Policy & Academia

10. **Bristol City Council – Fairness Commission Appointment (Cabinet Agenda)**
    https://democracy.bristol.gov.uk/Data/Cabinet/201408051800/Agenda/0805_5.pdf

11. **University of Bristol – Cabot Institute Case Study (2014) - Speaker**
    https://www.bristol.ac.uk/cabot/what-we-do/more-case-studies/2014/58.html

12. **APPG Food Poverty Inquiry Report**
    https://drive.google.com/file/d/0BzjTPT8dQAS-VUdBVFA4NmVmZTQ/view?usp=sharing&resourcekey=0-MojxLspVjXKiQ6guOztGQw

13. **APPG Food Poverty Inquiry Evidence to Report**
    https://drive.google.com/file/d/0BzjTPT8dQAS-MWpLUGxGQkF0b1U/view?usp=sharing&resourcekey=0-ecH9gkI6dT5OQ0ZV_NixoA

14. **London Assembly: Zero Hunger City Report**
    https://drive.google.com/file/d/1-GENdCrtkSx8v4GBmAOZSNDO2k8vxSrO/view?usp=sharing

15. **Bloomberg European Mayors Challenge Finalist 2014, Bristol**

    The proposal was selected from a range of ideas submitted through the web-based 'George's Ideas Lab'. The lead author for the proposal is Mark Goodway of the Matthew Tree Project.

    https://bristolfoodpolicycouncil.org/may-2014-update/

    https://drive.google.com/file/d/0BzjTPT8dQAS-Nm4yQnpib29qSTA/view?usp=sharing&resourcekey=0-uldIYllQ20IUxS1brfAs4A

    https://drive.google.com/file/d/1JYs2IF2PLUCfDVZWk_VBSV-fabyyotTj/view?usp=sharing

16. **Bristol Sustainable Cities – Silver Award 2016:**

    https://drive.google.com/file/d/1RcoXOHQAQwCzhLHl8lKdkGFnvhkfZ3ct/view?usp=sharing

    https://drive.google.com/file/d/12YztI_b6dJzoYyyCq2aGmiQK64K6Elk8/view?usp=sharing

17. **Sustainable Food in Urban Communities URBACT (2014)**
    Mark Goodway was part of a delegation from Bristol City Council to visit Lyon.
    https://www.sustainable-everyday-project.net/urbact-sustainable-food/?cat=91


© The Matthew Tree Project 2025

18. **DEMOS – British Aisles: Speaker (01/04/2015)**

    Mark Goodway, speaker at the DEMOS British Aisles event.

    https://demos.co.uk/research/british-aisles/

    https://drive.google.com/file/d/0BzjTPT8dQAS-MklPdDlQZUl5aUU/view?usp=sharing&resourcekey=0-CeyfHpDqw8jJOSxt4tnyoA

19. **Renewal Choir – Christmas Concert 2013: Handel's Messiah.**

    Public speaking engagement: "Mark Goodway who is assisting the Inns Court Centre with fund raising efforts and the development of a sustainability strategy gave a simple yet powerful appeal for support on the night."

    http://renewalchoir.org/christmas-concert-2013/

20. **The Food Foundation – Youth 4 Food (2021): Speaker**

    https://foodfoundation.org.uk/initiatives/youth4food-festival-valley-fest

21. **Bristol Fairness Commission, 2014 – advisor, expert panel member**

    Read full report here: https://drive.google.com/file/d/0BzjTPT8dQAS-dFliWVpvWjhsRUk/view?usp=sharing&resourcekey=0--61z-Q5vplzBOIWB-LJKJg

    Image of the expert panel, including Mark Goodway here: https://drive.google.com/file/d/0BzjTPT8dQAS-a2otQ2J1SEMxcms/view?usp=sharing&resourcekey=0-s1tq-ZSm53II_3lzQ7GPxQ

22. **Microsoft Philanthropies Global Nonprofit Leaders' Summit, 2025 – invited attendee**

    https://10times.com/e1dz-rd5z-7k1r-1



© The Matthew Tree Project 2025

## TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS

The trustees (who are also directors of The Matthew Tree Project for the purposes of company law) are responsible for preparing the Trustees' Report (incorporating the strategic report and directors' report) and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that 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 financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Trustees on .....31/10/2025.....and signed on their behalf by:

Colin Sainsbury CMC FIC – Trustee Chair
31 October 2025

## INDEPENDENT EXAMINERS REPORT

**Independent examiner's report to the trustees of The Matthew Tree Project**
I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 December 2024.

**Responsibilities and basis of report**
As the charity's trustees of the Company (and its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

**Independent examiner's statement**
Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of the 'Association of Accounting Technicians', which is one of the listed bodies.

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

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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

Andy Forse FMAAT
Causeway Accountancy Bristol Ltd
1st Floor Office, 788 Fishponds Road
Fishponds, Bristol
BS16 3TE. M: 07814018838

Date: 31/10/2025

## FINANCIAL ACCOUNTS 2024

| | NOTE | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2024 £ | Total Funds 2023 £ |
|---|---|---|---|---|---|
| **Income from:** | | | | | |
| Donations | | 49,940.88 | 57,788.05 | 107,728.93 | 91,424.60 |
| Grants receivable | | 45,000.00 | 49,200.00 | 94,200.00 | 213,605.98 |
| Charitable activities | | 0 | 0 | 0 | 0 |
| Other sources | | 6,311.70 | 0 | 6,311.70 | 5,014.92 |
| **Total income** | | **101,252.58** | **106,988.05** | **208,240.63** | **310,045.50** |
| **Expenditure on:** | | | | | |
| Raising funds | | 3,755.48 | - | 3,755.48 | 4,636.32 |
| Charitable activities | 2 | 123,741.62 | 106,217.87 | 229,959.49 | 268,345.20 |
| **Total expenditure** | | **127,497.10** | **106,217.87** | **233,714.97** | **272,981.52** |
| **Net income/(expenditure) and net movement in funds** | | | | | |
| **Total funds at 1 January 2024** | 3 | 268,679.96 | 32,300.55 | 300,980.51 | 37,063.98 |
| **Total funds at 31 December 2024** | 10 | **(26,244.52)** | **770.18** | **(25,474.34)** | **263,916.53** |
| | 10 | **242,435.44** | **33,070.73** | **275,506.17** | **300,980.51** |

There are no recognised gains or losses other than the results for the year as set out above.

All activities are classed as continuing.

Fund-accounting comparative transactions are shown in note 4.

| | NOTE | 2024 | 2023 |
|---|---|---|---|
| | | £ | £ |
| **Fixed assets** | | | |
| Tangible fixed assets | 6 | 15,113.12 | 20,147.64 |
| Investments | 7 | 1.00 | 1.00 |
| | | 15,114.12 | 20,148.64 |
| **Current assets** | | | |
| Debtors | 8 | 0.00 | 10.00 |
| Food stocks | | 5,158.09 | 6,103.76 |
| Rise loan account | | 269,797.56 | 222,775.98 |
| Cash at bank | | 25,467.06 | 79,885.67 |
| | | 300,422.71 | 308,775.41 |
| **Creditors: amounts falling due within one year** | | - | - |
| | 9 | 21,750.50 | 27,943.54 |
| | 9 | 18,280.16 | 0 |
| | | 40,030.66 | 27,943.54 |
| **Net current assets** | | 275,506.17 | 300,980.51 |
| Restricted and unrestricted funds | | | |
| Unrestricted funds | 11 | 242,435.44 | 268,679.96 |
| Restricted funds | 11 | 30,070.73 | 32,300.55 |
| **Total funds** | | 275,506.17 | 300,980.51 |

| | | 2024 | | 2023 |
|---|---|---|---|---|
| **Net cash flow from operating activities** | | (54,418.61) | | 63,777.20 |
| **Non-operational cash flows:** | | | | |
| **Investing activities** | | | | |
| Investment income | | 0 | 0 | 0 |
| Payments for tangible fixed assets | | 0 | 0 | 0 |
| **Net cash inflow/(outflow) for the year** | A | (54,418.61) | | 63,777.20 |

**Cashflow Restrictions**
Charity law prohibits the use of net cash inflows on any endowed or other restricted fund to offset net cash outflows on any fund outside its own objects, except on special authority. In practice, this restriction has not had any effect on cash flows for the year.

**A Analysis of changes in cash during the year**

| | 2024 | 2023 | Change |
|---|---|---|---|
| | £ | £ | £ |
| Cash at bank and in hand | 25,467.06 | 79,885.67 | (54,418.61) |

**B Analysis of changes in net debt**

| | At 01-Jan-24 | Cash flows | Non cash flows | At 31-Dec-24 |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| Cash and cash equivalents | | | | |
| Cash | 79,885.67 | (54,418.61) | | 25,467.06 |
| **Total** | 79,885.67 | (54,418.61) | | 25,467.06 |

## 1 Accounting Policies

a) The financial statements have been prepared in accordance with the Charities Act 2011, the Companies Act 2006, Financial Reporting Standard FRS102, and the Charities' Statement of Recommended Practice (FRS102). Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy note(s).
The charity meets the definition of a public benefit entity under FRS102.
The trustees consider that the charity is able to continue as a going concern for at least the next twelve months. Please refer to the trustees' consideration in the Trustees' Report.
b) Income from donations is included when it is receivable, except as follows:

I. When donors specify that donations given to the charity must be used in future accounting periods, the income is deferred until those periods;
II. When donors impose conditions, which have to be fulfilled before the charity becomes entitled to use such income, the income is deferred until the pre-conditions have been met.

c) Gifts in kind includes donated services and facilities which are recognised at a reasonable estimate of their gross value to the Charity. An equivalent amount has been included as expenditure under the appropriate heading in the Statement of Financial Activities.
d) Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure includes attributable VAT, which cannot be recovered.
e) Grants payable is charged in the year when the offer is conveyed to the recipient except in those cases where the offer is conditional, such grants being recognised when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the year-end are noted as a commitment, but not accrued as expenditure.
f) Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition.
Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value, over the useful economic life of that asset as follows:

| | |
|---|---|
| Equipment | 5% per annum on a reducing balance basis |
| Office equipment, furniture and fixtures | 5% per annum on a reducing balance basis |
| Motor vehicles | 5% per annum on a reducing balance basis |

g) Cash at bank includes cash and short-term highly liquid investments with a notice of withdrawal period of three months or less.
h) Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.
i) Creditors are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.
j) Unrestricted funds can be used in accordance with the charitable objects at the discretion of the trustees.

l) Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. Expenditure which meets these criteria is charged to the fund, together with a fair allocation of management and support costs. Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

## 2 Costs of activities in furtherance of charity's objectives

| | Total Funds 2024 £ | Total Funds 2023 £ |
|---|---|---|
| **Direct costs** | | |
| Food costs | 59,201.91 | 44,361.77 |
| Premises | 12,040.26 | 16,118.21 |
| Salaries | 97,528.27 | 90,041.22 |
| Other staff costs | 2,736.66 | 4,700.90 |
| Motor and travel expenses | 14,963.43 | 3,287.26 |
| Phone/IT costs | 1,566.63 | 1,881.21 |
| Printing and stationery | 660.28 | 859.73 |
| Hardship grants | 933.81 | 367.95 |
| | 189,631.25 | 161,618.25 |
| **Support costs** | | |
| Salaries | 32,500.00 | 34,183.02 |
| Depreciation | 5,034.52 | 6,715.88 |
| Banking & finance | 693.84 | 41.20 |
| **Governance costs** | | |
| Legal and professional fees | 1899.88 | 65,606.85 |
| Accountancy & Independent examiner's fee | 200.00 | 180.00 |
| | 40,328.24 | 106,726.95 |
| | 229,959.49 | 268,345.20 |

## 4 Fund-accounting comparative figures

| | General Funds £ | Restricted Funds £ | Total Funds 2024 £ |
|---|---|---|---|
| **Income from:** | | | |
| Donations | 49,940.88 | 57,788.05 | 107,728.93 |
| Grants receivable | 45,000.00 | 49,200.00 | 94,200.00 |
| Charitable activities | 0 | 0 | 0 |
| Other sources | 6,311.70 | 0 | 6,311.70 |
| **Total income** | **101,252.58** | **106,988.05** | **208,240.63** |
| Expenditure on: | | | |
| Raising funds | 3,755.48 | - | 3,755.48 |
| Charitable activities | 123,741.62 | 106,217.87 | 229,959.49 |
| **Total expenditure** | **127,497.10** | **106,217.87** | **233,714.97** |
| **Net income/(expenditure) and net movement in funds** | **(26,244.52)** | **770.18** | **(25,474.34)** |
| **Total funds at 1 January 2024** | 268,679.96 | 32,300.55 | 300,980.51 |
| **Total funds at 31 December 2024** | **242,435.44** | **33,070.73** | **275,506.17** |

## 5 Salaries

| | 2024 £ | 2023 £ |
|---|---|---|
| Salaries, National Insurance & Staff Pension | 130,028.27 | 124,224.24 |
| | 130,028.27 | 124,224.24 |

## 6 Tangible Fixed Assets

| | Equipment | Office equipment, fixtures & fittings | Motor vehicles | Total |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| **Cost** | | | | |
| At 1 January 2023 | 69,254.86 | 24,388.09 | 13,797.49 | 107,440.43 |
| Additions | (2,797.51) | 2,797.51 | | |
| At 31 December 2023 | 66,457.35 | 27,185.60 | 13,797.49 | 107,440.43 |
| **Depreciation** | | | | |
| At 1 January 2023 | 54,159.22 | 20,481.93 | 12,651.65 | 87,292.79 |
| Charge for the year | 976.40 | 3,773.91 | 284.21 | 5,034.52 |
| At 31 December 2024 | 55,135.62 | 24,255.84 | 12,935.86 | 92,327.31 |
| **Net book value** | | | | |
| **At 31 December 2024** | **11,321.73** | **2,929.76** | **861.63** | **15,113.12** |
| At 31 December 2023 | **15,095.64** | **3,906.16** | **1,145.84** | **20,147.64** |

## 7 Investments

| | 2024 | 2023 |
|---|---|---|
| | £ | £ |
| 100% holding in subsidiary | 1 | 1 |

RISE Social Enterprise Ltd (company number 10740064) is a subsidiary of the charity. RISE Social Enterprise was originally created by The Matthew Tree Project (TMTP) in 2017 to build a trading arm that could both advance TMTP's social mission and generate unrestricted income. As with many social enterprises, the journey has not been linear. The pandemic, supply-chain shocks, and post-COVID funding pressures meant RISE's initial food-based model could not be fully realised. To protect TMTP's core charitable services at that time, the charity prudently absorbed RISE's costs, creating an inter-company loan balance that temporarily appears as an asset on TMTP's balance sheet. While this accounting position may appear unusual, it in fact reflects **responsible crisis management** — TMTP ensured continuity of life-saving frontline services during an unprecedented period for the sector. The loan balance is not lost money; rather, it represents **a recoverable investment** in an asset wholly owned by TMTP. Once trading profitably, RISE will begin repaying the £269k loan to TMTP, ultimately transforming it into a **£269k fund of unrestricted income** that can be drawn down by TMTP with no tax implications. Far from being a liability, RISE represents **a future pipeline of unrestricted, sustainable income** and a strategic asset that strengthens TMTP's resilience and independence from grant dependency.

## 8 Debtors

| | 2024 | 2023 |
|---|---|---|
| | £ | £ |
| Rental deposits | 0 | 0 |
| | 0 | 0 |

## 9 Creditors falling due within one year

| | 2024 | 2023 |
|---|---|---|
| | £ | £ |
| Creditors | 1.00 | 1.00 |
| PAYE and NI, salaries | 21,749.50 | 27,942.54 |
| M Goodway (loan account) | 18,280.16 | 0 |
| | 40,030.66 | 27,943.54 |

## 10 Movement in funds

| | At 1 Janaury 2024 | Income | Expenditure | Transfers | At 31 December 2024 |
|---|---|---|---|---|---|
| | £ | £ | £ | £ | £ |
| **Restricted funds** | | | | | |
| Warmer Homes Project | 7,464.75 | 5,000.00 | 7,464.75 | - | 5,000.00 |
| Rebuilding Lives | 18,732.04 | 44,200.00 | 40,019.40 | - | 22,912.64 |
| Designated funds; Food stock funds | 6,103.76 | 57,788.05 | 58,733.72 | - | 5,158.09 |
| | 32,300.55 | 106,988.05 | 106,217.87 | - | 33,070.73 |
| Unrestricted general funds | 268,679.96 | 101,252.58 | 127,497.10 | - | 242,435.44 |
| Total funds | 300,980.51 | 208,240.63 | 233,714.97 | - | 275,506.17 |

Unrestricted funds are available to be used at the discretion of the trustees in line with the charity's purposes.

Designated funds - The Food Stock fund represents gifts of food received during the year and food distributed to those in need. The balance at the end of the year is the value of food stocks held by the charity

## 11 Analysis of Net Assets Between Funds

| | Tangible Fixed Assets | Other Net Assets | Total Funds 2024 |
|---|---|---|---|
| | £ | £ | £ |
| Restricted funds | | 33,071.73 | 33,071.73 |
| Unrestricted funds | 15,114.12 | 227,320.32 | 242,434.44 |
| | 15,114.12 | 260,393.05 | 275,506.17 |

| Prior Year | Tangible Fixed Assets | Other Net Assets | Total Funds 2023 |
|---|---|---|---|
| | £ | £ | £ |
| Restricted funds | | 32,300.55 | 32,300.55 |
| Unrestricted funds | 20,148.64 | 248,531.32 | 268,679.96 |
| | 20,148.64 | 280,831.87 | 300,980.51 |

## 12 Related parties

There were no related party transactions during this, or the prior year, other than those noted elsewhere in the accounts. No trustees received or waived expense payments during either the current, or previous year.

## APPENDIX A: ORGANISATIONAL RESILIENCE PLAN (2024 – 2026)

### 1. Purpose and Context

This plan sets out how The Matthew Tree Project (TMTP) will maintain stability, adaptability, and continuity of operations during periods of financial pressure, staff turnover, or external crisis. Its aim is to ensure TMTP remains effective in fulfilling its charitable purpose — preventing homelessness and alleviating poverty — even in times of disruption.

TMTP operates in a high-demand, low-margin charity environment, delivering critical frontline services to some of Bristol's most vulnerable households. This *Resilience Plan* supports the charity's ongoing "going concern" status and strengthens its position with funders, partners, and regulators.

---

### 2. Strategic Resilience Objectives

1. **Financial Resilience:** Diversify and stabilise income streams to safeguard frontline delivery.
2. **Operational Resilience:** Ensure service continuity in the event of staffing or premises disruption.
3. **Reputational Resilience:** Maintain public confidence and transparency.
4. **Governance Resilience:** Ensure effective oversight, decision-making, and succession planning.
5. **Digital Resilience:** Protect data, systems, and service delivery capacity in a hybrid and digital environment.

---

### 3. Financial Resilience

**Risks Identified:**

- Delay or loss of grant funding.
- Reduction in unrestricted income.
- Cost increases (utilities, insurance, food, fuel).

**Mitigation Measures:**

- Maintain minimum free reserves of £50,000 (target).
- Develop RISE Social Enterprise to generate unrestricted earned income.
- Implement a rolling **12-month cash flow forecast** reviewed monthly by a Board member.
- Prioritise core cost recovery in all new funding bids.
- Maintain relationships with at least three emergency funders (e.g., grant making Foundation, business partner, philanthropist).
- Establish contingency agreements with food suppliers and landlords to manage short-term cash flow gaps.

---

### 4. Operational Resilience

**Risks Identified:**

- Key staff absence or turnover.
- Disruption to delivery premises (e.g., Filwood Hub or partner venues).
- External crises including:
    - Economic instability or recession caused by global market volatility and emerging trade barriers, potentially increasing demand while reducing charitable funding.
    - Political instability and civil unrest linked to national or international polarisation, including the rise of anti-immigration rhetoric which may directly affect TMTP clients and community cohesion.

    - Escalation of international conflict or war, resulting in economic shocks, supply chain disruption, or displacement of new refugee populations seeking crisis support.
    - Environmental factors such as severe weather events or pandemics impacting operational continuity.

Mitigation Measures:

- Maintain and regularly test a Business Continuity Protocol, including communication tree, remote-access tools, and emergency supplier contacts.
- Build flexibility into service delivery, enabling rapid adaptation to changes in demand or context (e.g., emergency food provision, outreach support).
- Cross-train staff and volunteers across essential roles to prevent single points of failure.
- Maintain secondary operational capacity through Beech House and/or partner venues.
- Strengthen local networks and mutual-aid relationships to support coordinated community response in times of social or political tension.
- Continue to monitor external economic and geopolitical developments through local authority and VCSE forums to anticipate and plan for potential impacts.
- Conduct an annual "resilience scenario review" each Autumn, stress-testing TMTP's ability to continue delivery under a range of external shock scenarios.

---

5. Governance & Leadership Resilience

Risks Identified:

- Loss of key trustees or CEO incapacity.
- Weak succession pipeline.
- Failure to maintain regulatory compliance.

Mitigation Measures:

- Maintain a **Trustee Skills Matrix** and active recruitment plan.
- Appoint a **Deputy Chair** and designate the **COO (Michelle)** as Acting CEO in the event of incapacity.
- Documented delegation of authority for operational decisions.
- Maintain shared access to all key governance documents via secure cloud storage.
- Annual governance review by an external advisor (e.g., Anstey Barton).

---

6. Digital & Information Resilience

Risks Identified:

- Cyber-attack or data breach.
- System downtime or hardware failure.
- Loss of access to digital case management systems.

Mitigation Measures:

- Multi-factor authentication across all systems (Apricot, Microsoft 365, HSBC, etc.).
- Daily encrypted data backup and monthly security review.
- Access rights limited by staff role.
- Annual cybersecurity audit with IT partner.
- Digital training for staff on GDPR, phishing, AI and cyber-safety.
- Maintain alternative manual record templates for emergency offline operations.

---

7. Reputational & Communications Resilience

Risks Identified:

- Negative media or social media exposure.
- Miscommunication with stakeholders or clients.

Mitigation Measures:

- Maintain a Crisis Communications Protocol with pre-approved messaging.
- Only CEO and Chair authorised to issue public statements.
- Rapid escalation process for complaints or data breaches.
- Regular positive communications via social media, website, and newsletters to build public trust.

---

## 8. People & Wellbeing Resilience

Risks Identified:

- Staff burnout, vicarious trauma, or loss of morale.
- Volunteer attrition.

Mitigation Measures:

- Provide access to counselling and reflective supervision.
- Maintain appropriate staff-to-case ratios.
- Offer flexible working and wellbeing check-ins.
- Develop volunteer retention plan (recognition, training, pathways to employment).
- Embed “psychological safety” in management culture.

---

## 9. Review and Activation

- This plan is reviewed annually by the Board (each October).
- The CEO activates the plan in response to any serious disruption (financial, operational, or reputational).
- A post-incident review will be undertaken to capture learning.
- Key performance indicators (KPIs) include: reserve level, staff turnover, digital uptime, service continuity rate.

---

## 10. Ownership and Oversight

- **Plan Owner:** CEO (Mark Goodway MBE)
- **Board Oversight:** Trustee Chair (Colin Sainsbury)
- **Next Review Date:** October 2025

**THE MATTHEW TREE PROJECT**

England & Wales - Charity number 1146401

# Accounts

FIGHTING TO ERADICATE POVERTY FROM THE UNITED KINGDOM

# ANNUAL REPORT FOR THE YEAR ENDED 31 DECEMBER 2023

The Matthew Tree Project®

Supporting vulnerable households in Bristol since 2010

Helping over 14,000 people escape a life of poverty and rebuild a healthier, weathier and happier future

Registered charity number: 1146401

*Mark Goodway MBE, on behalf of everyone at The Matthew Tree Project, proudly accepts the trophy for winner of Crisis Support NPO of the Year 2023/24 in the South West of England Prestige Awards.*

# Contents


**OFFICERS AND PROFESSIONAL ADVISORS** ..... 4

**REPORT OF THE TRUSTEES** ..... 5

**STRUCTURE, GOVERNANCE AND MANAGEMENT** ..... 5

**RISK MANAGEMENT** ..... 5

**OBJECTIVES AND ACTIVITIES FOR THE PUBLIC BENEFIT** ..... 6

**RESULTS FOR THE YEAR** ..... 6

**RESERVES POLICY** ..... 6

**GOING CONCERN** ..... 6

**ORGANISATION OVERVIEW, AIMS & OBJECTIVES** ..... 7

**SERVICE DELIVERY SUMMARY** ..... 8

**CASE STUDY: HOMELESSNESS** ..... 9

**KEY ATTRITUBES OF THE REBUILDING LIVES CRISIS SUPPORT PROGRAMME** ..... 11

**CASE STUDY: AT RISK OF LOSING JOB & HEALTH** ..... 13

**DAILY AND WEEKLY ACTIVITIES** ..... 15

Community Support Hub, Filwood ..... 15

One-2-One Weekly Support Package Elements: ..... 15

Specialist Services, introduced as required include (funded separately): ..... 16

Group Activities: ..... 16

Urban food growing site (using organic principles) ..... 16

**VITAL ROLE OF THE CITIZEN VOICE GROUP & CO-PRODUCTION** ..... 17

**OTHER REGULAR ACTIVITIES** ..... 18

Food Appeal Collections ..... 18

Children's Christmas Present Appeal ..... 19

Community Meal Celebration ..... 19

Name the Bear Easter Competition. ..... 19

**CASE STUDY: YOUTH UNEMPLOYMENT** ..... 20

**MONITORING, EVALUATION & IMPACT** ..... 22

**THEORY OF CHANGE: CASE MANAGEMENT AND REPORTING** ..... 23

**CASE STUDY: COST OF LIVING / CHILD POVERTY** ..... 24

**REBUILDING LIVES 2023 Factsheet** ..... 26

**HIGHER LEVEL OUTCOMES & CHANGE INDICATORS** ..... 28




© The Matthew Tree Project 2024

**SETTING AND ACHIEVING PERSONAL GOALS** ..... 29
**CASE STUDY: DOMESTIC ABUSE / HOMELESSNESS** ..... 30
**OTHER LOCATION(S)** ..... 31
**RELATED PARTIES: RISE SOCIAL ENTERPRISE** ..... 32
CRANFIELD TRUST SUPPORT ..... 36
**CASE STUDY: DEBT / HOUSING / / HEALTH / CHILD POVERTY** ..... 38
**AWARDS** ..... 40
**NATIONAL RECOGNITION** ..... 40
**TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS** ..... 42
**INDEPENDENT EXAMINERS REPORT** ..... 43
**FINANCIAL ACCOUNTS 2023** ..... 44


© The Matthew Tree Project 2024

## OFFICERS AND PROFESSIONAL ADVISORS

TRUSTEES who have served during the year and up until the date of signing the report are:
Nigel Goodway, Roger Wooldridge, Jonathan Evans, Colin Sainsbury.

New appointed trustees are:
Susan Brooks appointed on 26 October 2023; Tina Hammond appointed on 26 October 2023.

### INDEPENDENT MANAGEMENT ADVISOR

Anstey Barton Consulting
Huntsham
Tiverton
EX16 7NG

### INDEPENDENT HR ADVISOR

BrightHR
Peninsula Consulting
Victoria Place
Manchester M4 4FB

### FINANCE OFFICER

Sue McQuaid
Libra Accounting Services Ltd
54 Petherton Gardens
Hengrove, Bristol BS14 9BS

### INDEPENDENT SAFEGUARDING ADVISOR

Thirtyeight:one
PO Box 133, Swanley
Kent
BR8 7UQ

### BANKERS

HSBC Bank plc
431 Oxford Street
London
W1C 2DA

### INSURERS

Zurich Insurance plc
The Zurich Centre
3000 Parkway
Whiteley, Fareham PO15 7JZ

### PRINCIPAL & REGISTERED OFFICE OF THE CHARITY

Community Support Hub
10 Filwood Broadway
Knowle
Bristol
BS4 1JL

### ADMIN & TRAINING CENTRE

Ground Floor & 2nd Floor
Beech House, Brotherwood Court,
Almondsbury
South Gloucestershire
BS32 4QW

### INDEPENDENT ACCOUNTS EXAMINER

Andy Forse FMAAT
Causeway Accountancy
279 Lodge Causeway
Bristol BS16 3RA

### IMPACT MONITORING ADVISORS

Clarity CIC
The Old Bakery, Old Road
Harbertonford
Totnes TQ9 7TA

apricot™ CASE MANAGEMENT SOFTWARE

Fully integrated bespoke case management and impact monitoring system designed on the APRICOT® software platform and underpinned by The Matthew Tree Project 'Theory of Change Framework'.



© The Matthew Tree Project 2024

## REPORT OF THE TRUSTEES

The Board of Trustees present their annual report and the independently examined financial statements for the year ended 31 December 2023. These are prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Trust Deed, 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) and Financial Reporting Standard 102 and the Companies Act 2006.

## STRUCTURE, GOVERNANCE AND MANAGEMENT

The Mathew Tree Project was established in July 2010 and is a registered charity, number 1146401. The charitable Trust is registered as a company limited by guarantee, as defined by the Companies Act 2006. The governing document is its Memorandum and Articles of Association and is registered in England (company number 7324296).

The Charitable Company has no share capital, but under the terms of the Memorandum of Association, every member is liable to contribute a sum not exceeding £10 in the event of the Charitable Company being wound up.

The principal objects of the Charitable Company are:

"To prevent homelessness and help hard to reach vulnerable households escape poverty and rebuild a happier, healthier, and wealthier future.

The charity is fighting to eradicate poverty from the UK, one of the richest countries in the world. We have more wealth; more resources; more knowledge; more understanding than at any time in history. Yet still too many children grow up familiar with hunger, a cold home and exclusion from the norm of their peers. We are giving children a troubled start to life and wonder why we end up with troubled communities that cost us a fortune in social and health care public services. Bristol is a prosperous city; but this prosperity is not shared by all. Poverty leads to health inequalities and results in a shameful 9-year gap in life expectancy between those living in the richest and poorest wards.

We believe no-one's life expectancy and life chances should be curtailed by poverty. The work of the charity contributes towards this goal. Since 2010 we have helped over 14,000 people escape a life of poverty whilst simultaneously improving their mental and physical wellbeing. We use the knowledge gained by working on the frontline to engage with national policymakers to effect systemic change where the system is failing."

## RISK MANAGEMENT

The Trustees confirm that they regularly review the significant risks facing the Trust and have systems and procedures in place to mitigate those risks. The risk policy has adopted a risk mapping methodology that is applied to each identified risk, assessing the likelihood of it occurring and the severity of the impact of occurrence on the Trust.



© The Matthew Tree Project 2024

## OBJECTIVES AND ACTIVITIES FOR THE PUBLIC BENEFIT

The Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission when exercising their powers and duties.

## RESULTS FOR THE YEAR

The charity received income for the year of £310,045 (2022: £307,717), including £45,841 (2022: £186,659) of food gifts and £367.95 in hardship grants distributed to those in need. Expenditure for the year was £272,981 (2022: £392,363).

## RESERVES POLICY

The trustees aim to hold no more than £50,000 of free reserves. Any funds over this level are reinvested in the development of client services. At the end of the year, free reserves were £25,998, and at the end of 2022 free reserves were £16,108.

## GOING CONCERN

After making enquiries, the Trustees have a reasonable expectation that the Trust has adequate resources to continue its objectives and activities for the public benefit for the foreseeable future. Accordingly, they continue to adopt the going concern basis in preparing the annual report and financial statements.

Further details regarding the adoption of the going concern basis are in note 1 ‘Accounting Policies’ in the financial statements.



© The Matthew Tree Project 2024

## ORGANISATION OVERVIEW, AIMS & OBJECTIVES

The Matthew Tree Project's long-term vision is two-fold:

- Working holistically, to empower disadvantaged people to take control and live dignified, fulfilling, and self-sufficient lives.
- Engage with policy makers, locally and nationally, to effect systemic change and create a fairer and more equal society for the benefit of all, whereby poverty is eradicated from the United Kingdom once and for all.

The Matthew Tree Project, a Bristol based charity, was established in 2010 to help hard to reach vulnerable households escape poverty and rebuild a happier, healthier, and wealthier future.

The charity is fighting to eradicate poverty from the UK, one of the richest countries in the world. We have more wealth; more resources; more knowledge; more understanding than at any time in history. Yet still too many children grow up familiar with hunger, a cold home and exclusion from the norm of their peers. We are giving children a troubled start to life and wonder why we end up with troubled communities that cost us a fortune in social and health care public services.

Bristol is a prosperous city; but this prosperity is not shared by all. Poverty leads to health inequalities and results in a shameful 9-year gap in life expectancy between those living in the richest and poorest wards. We believe no-one's life expectancy and life chances should be curtailed by poverty. The work of the charity contributes towards this goal. **Since 2010 we have helped over 14,000 people escape a life of poverty whilst simultaneously improving their mental and physical wellbeing**. We use the knowledge gained by working on the frontline to engage with national policymakers to effect systemic change where the system is failing.

> *"The health of any society is not measured by how many millionaires or billionaires it has. The health of a society is measured by the number of people living in poverty. The bottom line is… in the UK too many people are suffering, trapped and condemned to a life of poverty. This should change. This needs to change. And we have the means as a society to make it change."*
>
> *Mark Goodway MBE*
> *FOUNDER – THE MATTHEW TREE PROJECT*

© The Matthew Tree Project 2024

## SERVICE DELIVERY SUMMARY

**The main activity of the charity is in the delivery of its unique award winning Holistic Crisis Support Programme - Rebuilding Lives.** The programme has been continuously developed into a 'gold standard' service over the last 14 years, consisting of a central 'main programme' fully and seamlessly integrated with separately funded specialised services that together provide a wide range of ***expertly joined-up service elements together to create a unique and personally tailored 'full support package'*** around each vulnerable household in the programme. Identifying challenges people may be experiencing and agree with them, how to find a way to overcome the issues they have.

The Rebuilding Lives Crisis Support Programme provides immediate relief, substantive change and transformational change. The **key element** of the programme is investing the time needed to build trust and relationships that are maintained throughout the client's journey through the programme. Clients are supported for as long as there is a need and close their own case when they no longer need our support. On average clients are supported for 3-9 months.

In addition to providing community engagement and holistic crisis support, the charity reduces isolation by bringing people together in a safe and socially vibrant environment, to help themselves, each other, and engage positively within the wider community where they live.

Services are shaped by the people we serve. Since conception, we have been working hard, with the critical assistance of our ***'Citizen Voice Panel'***, open to all current and ex-clients of the charity, to enhance the crisis support provided to help people better address the underlying causes of their crisis and rebuild a sustainable and better future for themselves. The **Holistic Crisis Support Programme - Rebuilding Lives,** reflects the feedback of this panel. Service support is constantly evolving as we live in a fast-changing world and the value to the charity of this group is that we learn about new challenges people are facing at the earliest possible time and act to put the activities and support people need in place quickly.

The Rebuilding Lives Programme is open to all. No-one is excluded. Referral criteria is that there is not enough income to cover essential bills such as food, fuel, and rent. Over 60% of referrals are at risk of becoming homeless. Our initial focus is to stabilise the immediate crisis and then to explore ways to maximise income and minimise expenditure. We take a 'whole person' holistic approach.

*The lack of food or fuel is a signal that there are deeper problems. Rebuilding Lives is an early intervention programme, preventing homelessness by engaging with the vulnerably housed before it is too late.* It is a Truly Holistic Tripartite Crisis Support Service addressing the multiple and complex underlying causes as well as the effects of poverty, *characterized by the treatment of the whole person, considering 1) mental, 2) physical, and 3) social factors, rather than just the symptoms.*



© The Matthew Tree Project 2024

## CASE STUDY: HOMELESSNESS

| | |
|---|---|
| Referred by | Self-referral |
| Reason for referral | Homeless / Sofa Surfing |
| Situation | 'D' is a 47-year-old man, who had no fixed abode and was sofa surfing at his sister's home and sleeping on the sofa. This was very challenging because his sister has two young children, and her eldest child has Downs Syndrome with behavioural problems, is very disruptive and does not sleep, and is up for a lot of time during the night. As 'D' is on the sofa this is extremely detrimental to his health, and he does not sleep.<br><br>'D' first signed up for HomeChoice 15 years ago when his relationship broke down and he parted from his son's mother, and he had to leave the family home, leaving him homeless. Before finding a home of his own he entered a new relationship and moved in with his partner. This relationship broke down in 2023 and 'D' became very distressed and suffered a heart attack and is now on medication for life. He has been diagnosed with acute coronary syndrome, vascular respiratory disease, COPD and anxiety detachment.<br><br>'D's son suffers with Attention Deficit/Hyperactivity Disorder, (ADHD) and autistic Tourette's. His son is very unhappy living with his mother and her new partner and has expressed he wants to live with his father who he feels more comfortable with.<br><br>'D' initially asked Citizens Advice for help but did not get anywhere and then came to us in February 2024 upon the advice of a friend who was aware of The Matthew Tree Project. |
| What they needed | To find a home; emotional support; essential household items |
| What we did for them | Updated his home choice application, arranged an appointment with the homelessness prevention team at Bristol City Council. Liaised with BCC to further his application to assist with a quicker outcome. We also helped with form filling and a BCC application form for a flat. Liaised with Credit Union and set up an application for a deposit |



© The Matthew Tree Project 2024

| | |
|---|---|
| | scheme. Sourced household items and delivered them to D's new home as it was completely empty. |
| Outcome | D was successful in obtaining a credit union deposit scheme and a flat with BCC. D picked up the keys and moved in on 10 June 2024.<br>'D' is now going to be able to have his son to stay with him for long periods of time, with the long-term plan being, his son will live with him full time. |
| CLIENT QUOTE | *"When I first came to the Matthew Tree I was struggling with my health, unable to get a full night's sleep as I was on my sister's sofa which was exacerbating my anxiety, and I needed to use my GTN medication spray more frequently than I should and therefore needed to visit healthcare professionals often. My hospital consultant advised avoiding stressful situations as it was making my condition so much worse, which was impossible where I was living. I came to Matthew Tree for help with my housing situation, phone calls, applications and paperwork. I would like to thank them all for the AMAZING help I have received over the past few months from them.*<br>*I would and will recommend this supporting agency to family and friends. When I came first, I felt I was on a ladder going down and down, since coming I now for the first time in my life feel like I am going up the ladder. Thank you, Ladies, for all you have done for me. I will never forget you. D"* |



© The Matthew Tree Project 2024

## KEY ATTRITUBES OF THE REBUILDING LIVES CRISIS SUPPORT PROGRAMME

The attributes of the Holistic Crisis Support Programme - **Rebuilding Lives**, are:

**Holistic Tripartite**: The foundation of the charity is the unique **Rebuilding Lives** programme. A Truly Holistic Tripartite Crisis Support Programme addressing the multiple and complex underlying causes as well as the symptoms of poverty, characterised by the treatment of the whole person, considering 1) mental, 2) physical, and 3) social factors.

**In-depth programme:** where long-term relationships are cultivated. Not a helpline, one-off activities, drop-in only, or signposting to other services. Building trust, and in addition to stabilising the initial crisis, provide the next stage in longer-term support, with a plan which helps people to positively move on out of poverty.

**Person-centred service:** Recognising that as a single charity it is not possible to meet all the needs of the people we support; working hard to build trusted strategic partnerships with providers or agencies who can help people to overcome the challenges they face and meet their basic needs. Referring clients for support, whilst continuing to track progress, ensuring their needs are being addressed.

**Empowering people to develop and achieve Personal Plans:** Working together to understand the challenges people are experiencing and agreeing with them how to find a way to overcome the issues they have. Keeping electronic records and case files of each person supported, noting progress against activities and being able to demonstrate the difference being made through these records.

**Shaped by the people it serves:** At the heart of this ***innovative award-winning multi-agency social mobility change model***, are the people it supports, empowered and in control of their unique journey. Rebuilding Lives positively impacts self-confidence, self-worth, self-esteem and converts hopelessness into hope and belief that a healthier, happier, wealthier future is possible and worth fighting for.

**Personally tailored 'full support package':** The Rebuilding Lives programme works hard to bring a wide range of ***expertly joined-up service elements together to create a unique and personally tailored 'full support package'*** around each vulnerable household in the programme. Identifying challenges people may be experiencing and agree with them, how to find a way to overcome the issues they have.

**Open Monday-Friday:** The Rebuilding Lives Programme is delivered from the charity's ***Community Support Hub in Filwood***, one of the UK's top 1.5% deprived wards. Reducing isolation by bringing people together in a safe and socially vibrant environment, to help themselves, each other, and engage positively within the wider community where they live.



© The Matthew Tree Project 2024

REMOTE SUPPORT

**Remote support available:** Remote support by phoneline is provided for those who are housebound or unable to travel to the Holistic Crisis Support Hub in Filwood. This makes the Rebuilding Lives programme available and accessible to anyone in need regardless of post code, creating a city-wide service.

ALL INCLUSIVE

**Open to all:** no one is excluded from access to the Rebuilding Lives programme regardless of age, gender, ethnicity, post code, disability, religious belief, or sexual orientation. Anyone in crisis will receive the help they need. This affords the charity a unique insight into the poverty drivers across the board spectrum of society as we do not only support one category of people or issue.

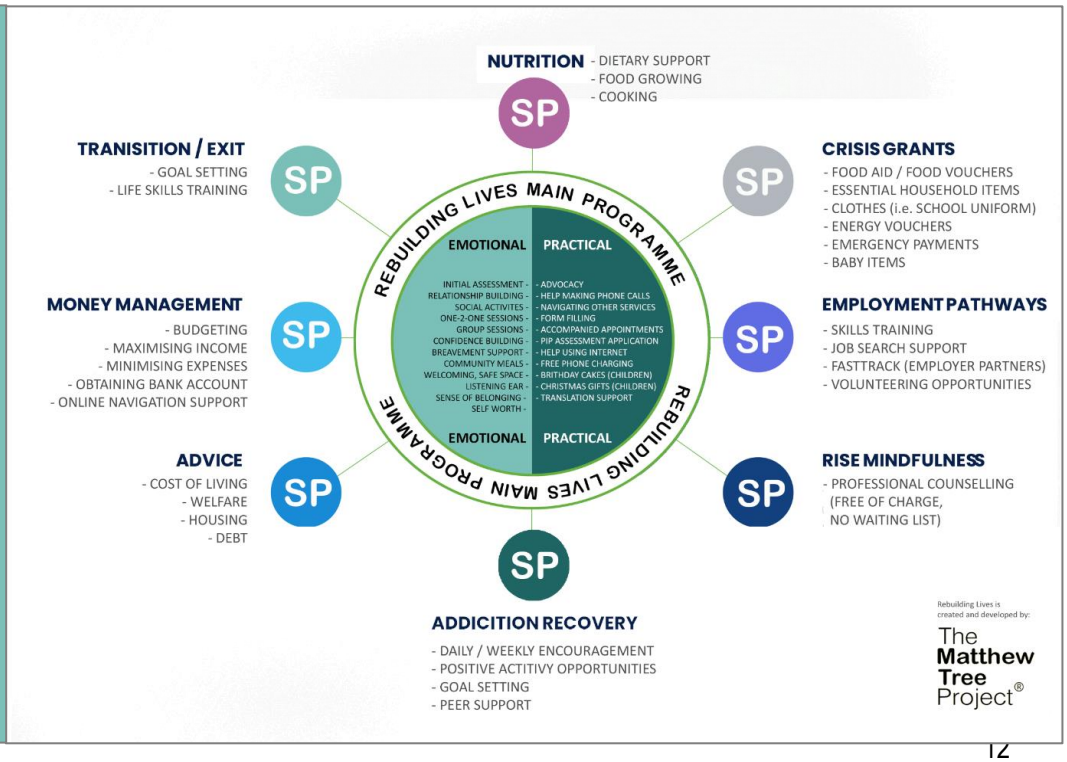
## IMMEDIATE RELIEF, SUBSTANTIVE & TRANSFORMATIONAL CHANGE

***Immediate relief*** includes stabilising crisis, i.e., avoiding becoming homeless, stop missing meals, keep house warm. ***Substantive change*** includes resolving debt and managing money better; maximising income and reducing expenditure; staying in addiction recovery; eating better; feeling better about self; have more control over life choices; learning new skills; not isolated; engaging more in the wider community. ***Transformational change*** includes higher aspirations; self-belief; positive change of worldview; caring more about others; better quality of life.

## GIVING PEOPLE HOPE FOR A BETTER FUTURE

At the heart of this ***innovative award-winning multi-agency social mobility change model***, are the people it supports, empowered and in control of their unique journey. Rebuilding Lives positively impacts self-confidence, self-worth, self-esteem and converts hopelessness into hope and belief that a healthier, happier, wealthier future is possible and worth fighting for. The Rebuilding Lives Programme builds resilience and is transformational.

*Right: Rebuilding Lives consists of a central programme delivered day-2-day seamlessly integrated with separately funded specialist services that are introduced as and when required creating a personally tailored end-2-end support package around each client.*






© The Matthew Tree Project 2024

# **CASE STUDY:** AT RISK OF LOSING JOB & HEALTH

| | |
|---|---|
| Referred by | Self-Referral – his work colleague, at Bristol City Council, recommended he come to The Matthew Tree Project. |
| Reason for referral | Support for his PIP (personal independence payment) court appeal hearing before a judge, GP and DWP employee |
| Situation | M, a 49-year-old man, lives with his wife and teenage daughter who works in an outdoor role for Bristol City Council maintaining the parks and open spaces. M enjoys his job and working outdoors is very important for his mental health conditions. He is struggling with ill health, both physically and mentally. He has osteoarthritis, musculoskeletal connective tissue disorder, poor mental health - mixed anxiety, depression and Tourette's.<br><br>M was doing all he could to help himself. He was struggling to hold down his job working for BCC local authority due to his conditions even though, upon his request, his employer had granted him light duties, but even this was now proving too much for him. He struggled to get to work and was taking more and more sick days and annual leave to try to cover his absences. He had no life outside work, his wife was now preparing all his meals, helping him to bathe and trying to keep the house running because M couldn't do anything when he returned home from work, and he often just went straight to bed due to chronic fatigue and the pain he was suffering. In addition to his poor physical health, he was also battling poor mental health but wanted to try to remain in employment for his family, his dignity and his overall wellbeing. His wife had to accompany him to all his medical appointments because his anxiety and poor cognitive memory function meant he could not retain anything health professionals said to him.<br><br>M had made an application to the DWP for PIP so he could stay in employment at reduced hours. M's initial PIP application and mandatory reconsideration were both rejected with zero points, so M requested to appeal the decision in front of a judge in court. M needed help preparing for and attending the PIP appeal court hearing.<br><br>M was at the end of his tether and didn't know where to turn. He had tried several places for help, including Citizens Advice Bureau, but no one could help him. He desperately needed the extra income from |



© The Matthew Tree Project 2024

| | |
|---|---|
| | PIP to allow him to live a normal life. He was no longer capable to work full time.<br><br>M had been waiting since April 2023 and finally a date for a telephone court appeal hearing was scheduled for the end of June 2024. He was very anxious about the appeal and needed considerable help preparing for and attending it. |
| What they needed | Support and a need to feel that someone cared about his situation. Help preparing for the hearing, advocacy and support on the day of the PIP appeal court hearing. |
| What we did for them | M came in every week with his wife in the lead up to his telephone court hearing for support and preparation of all his paperwork, we also worked through his application decision paperwork from DWP, as he disagreed with all their decisions. He frequently got quite anxious as he was very nervous about the PIP appeal phone call.<br><br>We advocated and supported M during the PIP court appeal hearing. Present at the appeal hearing was a judge, and the doctor and DWP staff member who had made the original decision to deny M his PIP application. During the appeal hearing M experienced high levels of anxiety and required frequent breaks because of this. Our advocacy involvement enabled the judge to understand what was happening and ensured the hearing was not aborted. |
| Outcome | M won his appeal and will now receive full Personal Independence Payment (PIP). This will allow him to reduce his hours at work and buy up extra holiday if needed to allow further days off work to recover from days worked. This is a just decision that should have been made at the outset but due to the systemic failure of our welfare system process, often people are forced to go through gruelling experiences like this to receive what they are legally entitled to. Sadly, all too often, many people are unable to.<br><br>This is just one example of the type of case evidence The Matthew Tree Project use to highlight systemic failure with governmental policy makers in the hope that others do not have to go through the same in justice. |
| Client Quote | *"My wife and I are so grateful to you all, when I first came into The Matthew Tree Project, I didn't have anywhere else to turn, I had tried lots of organisations who said they couldn't help me. I was desperate and felt so alone and that no one cared, and I was very anxious about my PIP hearing. You immediately put me at ease, and I felt welcomed, safe and understood. Without you I wouldn't have made it through the hearing phone call, as it was, I had to keep leaving the room but having you by my side explaining to the judge I needed to take a breather was the reason I believe I was finally awarded PIP. Thank you all so much."* |



© The Matthew Tree Project 2024

## DAILY AND WEEKLY ACTIVITIES

### Community Support Hub, Filwood

The Rebuilding Lives Programme is delivered from the charity's ***Community Support Hub located in the very heart of the Filwood community (BS4 1JN),*** open Monday to Friday (pictured right) is where the food aid is distributed, group sessions happen and one2one support sessions take place where next steps are agreed and required actions implemented. If someone is unable to come in person, because of sickness for example, then we provide telephone crisis support to discuss the pressing issues and next step actions.

In addition to providing community engagement and holistic crisis support, the programme reduces isolation by bringing people together in a safe and socially vibrant environment, to help themselves, each other, and engage positively within the wider community where they live.

Filwood, one of the country's most disadvantaged communities is in the top 1.5% of most deprived neighbourhoods in the UK, has one of the highest levels of obesity (60.1%), child poverty (25.3%), 58.3% are claiming unemployment related benefits and only 2.4% have above average mental wellbeing. Poverty results in major health and social issues that are damaging for our citizens, costly for government and create a negative cycle from generation to generation.

We receive referrals from a wide range of statutory and non-statutory organisations and accept self-referral. This often happens when an existing client or ex-client tells someone they know to be struggling of their positive experience within the programme.

The Rebuilding Lives Programme provides a range of activities, driven by client needs as determined by them:

### One-2-One Weekly Support Package Elements:

- Diagnosis & understanding of underlying causes & barriers to progress.
- Advocacy
- Befriending
- Nutritional wellbeing (food & nutritional screening)
- Free internet access
- Free phone charging points
- Support filling out forms, understanding & replying to letters.
- Listening ear/emotional support
- Accompanied appointments, hearings, assessments.
- Volunteering opportunities (to build confidence and learn new skills)
- Activities in support of addiction recovery
- Social interaction/inclusion



© The Matthew Tree Project 2024

- Provision of essential household items (white/brown goods) grants
- Provision of crisis grants to (a) pay off debt such as energy arrears; and (b) emergency payments to turn the gas/electric meter back on
- Christmas presents (client's children)
- Transition/exit to independence support

**Specialist Services, introduced as required include (funded separately):**

- Professional Counselling
- Advice
- Financial wellbeing
- Skills training
- Securing Employment
- Warm Homes Project
- Children's Essentials

**Group Activities:**

- Citizen Voice Group
- Food Growing
- Food Appeal Collections
- Community Engagement, i.e., Name the Bear, Easter Competition
- Children's Christmas Present Appeal
- Community Meal Celebrations

The Matthew Tree Project Holistic Crisis Support Hub is open Monday to Friday for clients to come depending upon their needs and circumstances. Every client is different, every client case is different and because of this a key feature of the Rebuilding Lives Programme is that it adapts to create a uniquely tailored package of end-to-end joined-up support around each vulnerable household.

## Urban food growing site (using organic principles)

Wednesday is the food growing site volunteering and training day. The Matthew Tree Project run an urban food growing site in Brislington, Bristol (pictured below). The food grown is added to the food stocks of the charity to be distributed to vulnerable households who are unable to afford to eat properly. Food is grown using organic principles and clients receive food growing training, positive outdoor engagement with others (feeling part of a team and social interaction), and the sense of making a positive contribution towards the work of the charity.

© The Matthew Tree Project 2024

## VITAL ROLE OF THE CITIZEN VOICE GROUP & CO-PRODUCTION

Thursday (Community Support Hub) is when the Citizen Voice Group come together to discuss what challenges people are facing and what changes, if any, should be made to the Rebuilding Lives Programme. This is open to all clients to be part of – no-one is excluded. It is also a 'social' time where lunch is served, and people mingle. Many new friendships derive out of the time people spend together and it is due to the Citizen Voice Group that for the coming year the Rebuilding Lives Programme has been enhanced to where more time and expertise is devoted into helping people address the underlying causes of their crisis and removal of barriers to progress.

Co-production is central to the development of the 'Rebuilding Lives' social change model: creating priorities, language, and approaches among all those involved.

People with lived experience (clients and ex-clients; some staff; and some volunteers) work alongside everyone else, those employed and the volunteers within The Matthew Tree Project to shape every aspect of the programme: bringing a wealth and diversity of empathy and experience to our planning, practical development, and external communications.

Co-production within the 'Rebuilding Lives Support Programme' works on two levels:

- micro-level in terms of the individually tailored support each client case receives.
- macro-level in terms of the organisation and the scope of services provided.

Examples of co-production within the 'Rebuilding Lives' programme:

- people who use services co-facilitating the programme's service delivery to others
- everyone who use services are given multiple avenues, informal and formal, to input and shape services (for themselves and for others) at every point of engagement with the programme – at least once a week. These include but is not restricted to informal chit-chat in the social



© The Matthew Tree Project 2024

communal spaces; anonymous 'Comment Book' publicly available at all times; formal interview; citizen voice group which runs every Thursday and is open to all current and ex-clients.

- creating change through the sharing of experiences with the 'community' created within the programme, which bring together a wide spectrum of diverse peoples, with wide and diverse experiences and knowledge, enabling anyone to contribute to making a real difference to their community by way of helping others to improve their well-being, their circumstances and live well.
- giving autonomy to the service delivery team to do whatever is required to meet the needs of each client case - needs as determined by the client themselves.
- all clients close their own case which means each client can receive support from the programme for as long as they feel they need it.
- all clients choose their own food.

The key characteristics of co-production within The Matthew Tree Project are:

- Ensuring everyone involved in the project understands what co-production is and why it is so important. It is at the heart and soul of the DNA of the organisation.
- Training all team members to 'capture' and 'record' all relevant client comment, no matter how informal as we have found it's the informal conversations that are the most valuable of all.
- Co-produce project goals to ensure that they represent the aspirations of our clients.
- Ensuring our goal setting is flexible to adapt and change over time. Work towards them determinedly but being flexible about the methods – co-production throws up more creative and inclusive solutions than cannot be predicted at the outset.
- Co-production is about creating new, more resourceful solutions, not just finding the middle ground. We strive for the 'best' and most 'effective' solutions and are not tempted by the 'path of least resistance' approach.
- The needs of our clients take priority over the needs of the organisation.
- Ensuring we have the right people involved. If specific skills, experience, or characteristics are needed, we are transparent about this.
- We recognise we will never achieve perfect co-production, but we strive for it anyway!

## OTHER REGULAR ACTIVITIES

**Food Appeal Collections** happen once a month in partnership with ASDA. This is where a team will ask shoppers, as they enter the store, to buy an extra item or two and pop it into our basket when they leave. This is a great source of food supplies and serves to publicly raise awareness of the issue of local poverty. Often conversations that take place during this activity can lead to new people volunteering or financially supporting the work of the charity.

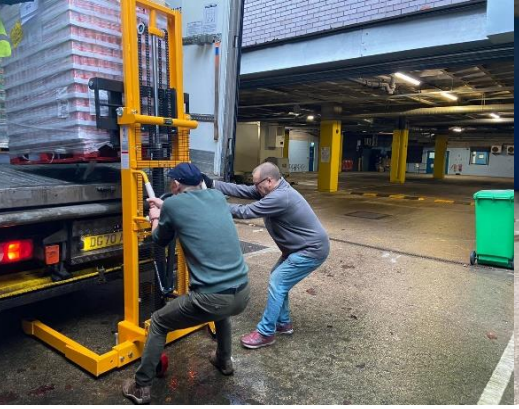
© The Matthew Tree Project 2024

**Children's Christmas Present Appeal** Every December the charity works in partnership with several large employers in Bristol to ensure all the children being supported by the programme receive at least one brand new gift to open on Christmas Day. We provide a list of our children to each partner employer with the age and sex of the child. Employees who choose to support the appeal pick one child and purchase a brand-new gift for that child for £10-£15 in value. Then, one evening in December we invite all those who have contributed by purchasing a gift to join the team for music and mince pies whilst wrapping all the gifts ready to be delivered to each vulnerable household before Christmas Day. Over 250 children benefited from this activity last Christmas.

**Community Meal Celebration** every December the charity works in partnership with one employer in Bristol to provide a Community Meal Celebration. Last December our partner for this event was AND Digital. This is always a wonderfully joyous occasion where many isolated and lonely people come together to enjoy, what for them will be their one and only festive feast of the Christmas season.

**Name the Bear Easter Competition**. At various points through the year, we organise community engagement events that are fun and encourage people to come together. In previous years we have put on Spring Fayre's and November 5th firework display and BBQ's. This year we ran a 'Name the Bear' Easter Competition that was aimed at the children in the community, many of whom walk past our Community Support Hub on their way to school. The Bear was displayed centre stage in our window and the children would come in to enter the name they choose for him/her. We then put on a buffet style food event to select the winning name, lucky dip style. Other prizes were donated by local businesses so that we were able to have multiple winners. The whole event was extremely popular.

© The Matthew Tree Project 2024



## CASE STUDY: YOUTH UNEMPLOYMENT

| | |
|---|---|
| Referred by | Self-Referral – son of single mum who was a client of TMTP |
| Reason for referral | School leaver unable to find employment |
| Situation | TH first encountered The Matthew Tree Project when his single mum was a client of our Rebuilding Lives programme, struggling on low income and unable to cover household bills. TH had left school and was enrolled in a scheme based at Bristol City Football in which he was learning media studies. He then finished the scheme at BCFC and was feeling lost, unable to get a job and bored at home. |
| What we did for them & outcome | His mother was now volunteering with The Matthew Tree Project on a regular basis and asked if TH could volunteer as well. TH started volunteering aged 17 years old in 2019, at our supermarket food appeals which involved approaching shoppers as they entered the store and asking them for food donations. In 2020 when Covid hit, our services upscaled overnight and we needed all the help we could get at our food distribution warehouse. TH started to come on a regular basis and very quickly became an integral part of the food distribution team. He assisted the drivers and regularly went out on home deliveries to our clients; the drivers were always very happy when they were teamed with TH and often commented on what a hard worker he was. He also interacted well with clients on the deliveries and represented TMTP well. During this time, we noticed TH grew in confidence and skills set. In addition to drivers' mate, he also worked closely with the warehouse supervisor and assisted within the warehouse, putting client food orders together, loading and offloading vehicles, stacking shelves and cleaning. Then a paid cleaning job role became available, and he was successful in securing part time employment with us as the warehouse cleaner.<br><br>As well as working part time for us he also continued volunteering daily. TH's confidence went from strength to strength and in 2021 he was successful in securing a full-time warehouse position in Avonmouth, which is on the other side of Bristol to where TH lives in Filwood. TH says it was due to the skills and confidence he gained whilst with TMTP that enabled him to get the job. |



© The Matthew Tree Project 2024

| | |
|---|---|
| | TH has 4 siblings and lived with his single mother in one of the poorest wards in Bristol, where gaining employment is incredibly difficult. Securing his full-time position allowed him to be able to save money and he was able to move out of the family home and now lives independently, close to his new employment. He has also travelled abroad for the first time on his own and is loving life. |
| Client Quote | *"I worked and volunteered with The Matthew Tree Project for a few years and really enjoyed my time. I learnt skills like packing, unloading products, which helped me get into warehouse work when lockdown ended. I also had experience learning to work with and alongside others. The skills I learnt in this time helped me settle nicely into my new job as I already had all the experience gained that opened the door to new job opportunities. It was a good stepping stone for me and taught me skills I'd have to learn quickly in a warehouse environment and would have struggled if I had gone straight into warehouse work."* |



© The Matthew Tree Project 2024

## MONITORING, EVALUATION & IMPACT

Since 2017 we have been in the process of designing and implementing a bespoke case measurement and evaluation software system based on the industry sector leading platform 'Apricot'. Importantly the software is user friendly, customisable to our unique work and is designed to improve our data collection methodology, understanding of our work and improve our service support provision to our client group.

Apricot offers several 'sector firsts' in the way clients are supported.

## NO-ONE SLIPS THROUGH THE GAPS

All new clients are referred online via our highly secure, encrypted Apricot 'refer client' interface. For the first time we will have visibility of everyone who has been referred to the 'Rebuilding Lives' programme and at the end of each week, those who have been referred but have not turned up for support are being contacted to see if we can help them overcome whatever barriers may be holding them back from attending.

## REFERRAL ORGANISATIONS CAN CHECK THE CASE STATUS OF REFERRED CLIENTS

Each referral organisation has a unique log-in name and password which provides them with access to a list of all the clients they have referred to the programme and the current status of each case. For the first time referral organisations have access to impact information because of their referral, which will help in the accurate reporting of medium to long-term impact and outcomes to their funders and supporters.

Apricot offers a wide range of reporting options so the quality of information will be better. This is a very large and challenging piece of work and additional funding for the expertise required to fully implement and then manage the IT system network and software has been secured so that we are able to maximise Apricot's considerable potential.

We use quantitative and qualitative data to measure the effectiveness and impact of our work and get this information directly from our beneficiaries.

## EXTERNAL INDEPENDENT EVALUATION

The Matthew Tree Project appointed Clarity Clear Solutions for Social Purpose Organisations (Clarity CIC), a registered Community Interest Company No 09147860 with their registered Office in Okehampton, Devon to undertake 'Theory of Change' evaluation of our work and make proposals for improvement.

Formed in 2014, Clarity Clear Solutions for Social Purpose Organisations CIC is a non-profit company limited by guarantee. Clarity provides a skilled resource for the sector, helping organisations solve everyday issues, building resources and adding capacity.



© The Matthew Tree Project 2024

## THEORY OF CHANGE: CASE MANAGEMENT AND REPORTING

As we work with clients, we record any positive or negative change they tell us about and place it within the context of our ***'Theory of Change & Social Impact Measurement Framework'*** which underpins the 'Rebuilding Lives Support Programme'.

If a client tells us, for example, that their benefits are now in payment we would record a positive outcome for the payments and also another for the fact their financial situation has improved. By classifying these two positive changes and mapping them to the Theory of Change outcome groups we arrive at a count of positive change outcomes which measures the impact of our work with each client.

So, the client's benefit payment success will count towards 'Reduced Material Deprivation' and also 'Increased feeling of being in control of money/budget' as well as some Theory of Change measures.

Some of the outcomes in the Theory of Change Framework can occur frequently, such as the client having a more positive outlook or feeling happier, others will mostly be one-time changes such as moving to better accommodation.

Over the course of the last 7 years the 'Rebuilding Lives Support Programme' have designed a bespoke online case management software system based on the Apricot platform. Impact data is being collected at every interaction the client has with the programme. The case management system enables us to understand and improve the level of support provided and report on the impact of the programme to stakeholders and policy makers.

6 higher level outcomes of the 'Rebuilding Lives' Programme':

- People feel safe and more secure.
- People have support networks and feel connected.
- People have new or improved skills.
- People have improved health and wellbeing.
- People have improved resilience.
- People have hoper and a purpose.

## PREVENTING HOMELESSNESS

Many of our clients are 'vulnerably housed' and at risk of homelessness. ***Over 60%*** of clients are at medium or high risk of homelessness at the time of their referral to The Matthew Tree Project. We are successful in over 90% of cases at preventing homelessness happening.

A key aspect of the 'Rebuilding Lives' programme is its effectiveness to stabilise the crisis and prevent it getting any worse, thus for many, avoiding the threat of homelessness becoming a reality.

A range of different factors are used to signify the degree of risk, such as: receipt of eviction notice; eviction court hearing date set; degree of rent arrears; being in dispute with landlord; habitability of the home (health and environmental issues); bedroom tax; change in circumstances, i.e. family breakdown, loss of job, significant reduction of income, etc.



© The Matthew Tree Project 2024

# CASE STUDY: COST OF LIVING / CHILD POVERTY

| | |
|---|---|
| Reason for referral | Cost of Living / Loss of Job |
| Referred by | Self-referral |
| Situation | Family of 6; 2 adults and 4 children, aged, 9y, 10y, 14y, and 17y.<br>'D' self-referred herself and her family to us to in May 2023, she had lost her part time job, due to ill health. She is suffering from severe Chron's disease, anaemia, chronic fatigue and is under investigation for heart problems. Her husband is working on a self-employed basis, but on a very low income and has also had some health issues and had to take some weeks off work. He does not get paid when off work. Since 'D' left her job and with the cost-of-living crisis rising they found it very impossible to pay basic household bills and buy food and their debts were rising significantly. |
| What they needed | Food Aid, help with energy bills, PIP application, emotional support, advice and practical help with severe damp and mould in her property. Help with a large water debt of £984. Help writing letters to employer, applications and form filling. |
| What we did for them | • We supported 'D' with food aid and advocating with other organisations on her behalf. |



© The Matthew Tree Project 2024

| | |
|---|---|
| | • Completed a PIP application and a DLA (disability living allowance) application for her 9yr old son who suffers with Tourette's syndrome.<br>• Applied for energy vouchers.<br>• Purchased a dehumidifier to help with the damp and mould to aid better health living conditions.<br>• Purchased energy saving lightbulbs and radiator insulation to reduce energy bills.<br>• Made application for 'Assist and Restart Scheme' with Bristol Water. |
| Outcome | PIP awarded. Energy vouchers awarded, dehumidifier has completely improved the damp and mould in her home, and she said she has noticed a significant difference. Assist and Restart Scheme with Bristol Water put in place; she now has a plan with them, paying £1.00 a month for 2 years after which the debt will be written off. |
| Comment | *"I don't know what I would have done without The Matthew Tree Project, you have helped me so much with everything, I am very grateful for all your help, and the food has enabled me to make meals for my family. Having assistance with my debts, and applications has helped us so much, we were under so much stress before coming and didn't know where to turn. Thank you to all the team."* |



© The Matthew Tree Project 2024

## REBUILDING LIVES 2023 Factsheet

| Measure | 2023 |
|---|---|
| | |
| Number of unique beneficiaries | |
| Adults | 54.4% |
| Children | 45.6% |
| | |
| Case load: Number of people being supported at 01/01/2023 | 144 |
| Case load: Number of people being supported at 31/12/2023 | 196 |
| Case load: Increase/(decrease) in demand | +36.1% |
| | |
| Single person households | 53.6% |
| Families | 46.4% |
| | |
| Number of unique people supported during the period (2023) | 1123 |
| Projected number of unique people supported for the year ahead (2024) | 1390 |
| | |
| Location of client households | |
| Number of households supported in the period - total (2023) | 431 |
| Number of households - BS1 | 4 |
| Number of households - BS2 | 4 |
| Number of households - BS3 | 8 |
| Number of households - BS4 | 317 |
| Number of households - BS5 | 18 |
| Number of households - BS8 | 4 |
| Number of households - BS10 | 4 |
| Number of households - BS13 | 38 |
| Number of households - BS14 | 18 |
| Number of households - BS15 | 4 |
| Number of households - BS16 | 8 |
| Number of households - BS30 | 4 |
| *NB: clients from outside of the immediate Filwood BS4 area tell us that they choose to travel to The Matthew Tree Project for support because they cannot find any other similar programme local to where they live* | |
| | |
| Average length of support provided (in weeks) | |
| Across all cases | 30.5 |
| | |
| Isolation | |
| Number of clients without any other form of support | 61.6% |
| | |



© The Matthew Tree Project 2024

| Measure | 2023 |
|---|---|
| | |
| Client age groups | |
| 16 - 25 | 9.0% |
| 26 - 40 | 40.6% |
| 41 - 60 | 40.0% |
| 61 + | 10.4% |
| Unknown | 0% |
| | |
| Client employment status | |
| Casual labour | 0% |
| Employed full-time | 0.7% |
| Employed part-time | 3.3% |
| Employed zero-hour contract | 1.2% |
| Unpaid Maternity leave | 0% |
| Retired | 3.1% |
| Self-employed | 1.2% |
| Student | 0.4% |
| Unable to work – childcare/carer | 12.6% |
| Unable to work - health | 47.9% |
| Unable to work – Asylum/Immigration status | 4.2% |
| Unemployed | 19.7% |
| Unknown | 5.7% |
| | |
| Client risk of homelessness | |
| None | 14.5% |
| Low (but possible) | 26.1% |
| Medium/High | 63.8% |
| *Note: of all the clients at risk of homelessness over 90% were kept in housing.* | |
| What clients tell us they need support with | |
| Mental Health | 39% |
| Physical Health | 28% |
| Addiction | 17% |
| Benefit Issues | 26% |
| Debt | 57% |
| Legal issues | 5% |
| | |
| Overall, how would you rate the support you received from TMTP? (% - 7 out of 10 or higher) | 98.5% |
| | |
| Client Goals showing some progress or achieved | 67.2% |



© The Matthew Tree Project 2024

## HIGHER LEVEL OUTCOMES & CHANGE INDICATORS

*Sample size: 212 households (415 people) – who have been supported for over 6 weeks.*

| | | |
|---|---|---|
| People feel safe and more secure | Reduced material deprivation | 97.4% |
| | Reduced fear of homelessness | 48.6% |
| | More able to move from insecure living spaces | 17.7% |
| | Increased feeling of empowerment to protect personal safety | 29.0% |
| | Increased feeling of being in control of money/budget | 54.1% |
| | More trusting and open to help | 77.3% |
| | Increased feeling of safety | 32.9% |
| People have support networks and feel connected | Increased feeling of being connected to a network of supportive agencies and organisations | 77.1% |
| | Increased awareness that there are people there to help | 75.2% |
| | Feeling of being part of a community who know & care for you | 42.1% |
| | Reduced feelings of social isolation | 39.7% |
| | Broader social groups | 27.0% |
| | Better links with family | 10.9% |
| | Improved family relationship | 14.8% |
| | More able to access specialist services | 59.3% |
| | Take part in volunteering | 19.5% |
| People have improved resilience | Understanding and acknowledgment of root cause/issues | 53.1% |
| | Increased self-sufficiency | 29.0% |
| | Increased level of engagement | 55.9% |
| | Increased confidence | 43.1% |
| | Improved control over own life choices | 31.5% |
| | Less negative feelings (anger/resentment) | 51.9% |
| People have new and improved skills | Increased skills in being work ready | 22.5% |
| | Increased ability to grow own food and develop cooking skills | 45.7% |
| | Better able at working as part of a team | 19.1% |
| | Ability to budget | 37.5% |
| | Develop new skills to be able to earn a living | 18.1% |
| People have improved health and wellbeing | Increased access to healthy foods | 98.1% |
| | Decreased malnutrition | 96.2% |
| | Improved physical health | 93.3% |
| | Improved healthy weight levels | 33.8% |
| | Improved mental wellbeing | 99.1% |
| | Improved sports skills/active lifestyle | 35.5% |
| | Better able to access food and nutritional help | 100.0% |
| | Better eating habits and diet | 100.0% |
| | Enhanced and wider food experience | 93.3% |
| People have hope and purpose | Increased aspirations | 29.8% |
| | Better able to cope/stabilise crisis | 66.3% |
| | Improved self-belief | 32.5% |
| | Improved independence and resilience | 38.2% |



© The Matthew Tree Project 2024

Our clients tell us they feel happier, calmer, manage stress better, have increased self-sufficiency, improved independence and resilience, increased aspirations, feel more confident, better able to build positive relationships. They say they engage more in the community where they live, parents say their children perform better at school, they manage money better, are better able to work as part of a team, stay in recovery, and are better able to secure and hold down a job.

## SETTING AND ACHIEVING PERSONAL GOALS

We encourage clients to set personal goals for themselves and then we provide support to enable the goals to be achieved. It is not for us to tell people what they should do or strive for, rather we work hard to empower each client to be in control of their journey through the programme and create the life they want. We know our intervention is successful by the change that occurs within each client's life. Avoiding eviction; resolving debt; getting and holding down a job; maximising benefit income; reducing household expenditure; improved and better relationships; better housing conditions; increased self-confidence and self-esteem; learning new life skills (managing money better; cooking from scratch at home; food growing; Improved English language; IT skills); eating better and more healthily; improved mental health; staying in recovery from addiction; 42% of clients with children say school performance of their children improves since being in the programme.



© The Matthew Tree Project 2024

# CASE STUDY: DOMESTIC ABUSE / HOMELESSNESS

| | |
|---|---|
| Reason for referral | Domestic violence<br>Homeless |
| Referred by | Self-referral |
| Situation | 'E' fled domestic violence and was staying with her daughter, but due to continual arguments the relationship with her daughter broke down. She became scared for her safety and fled the daughters' home that caused her to become homeless. She is being treated for mental health conditions by Avon and Wiltshire Mental Health Partnership NHS Trust having been diagnosed with bipolar, PTSD, and extreme anxiety. 'A' was admitted into hospital after an episode caused by her situation. When she was discharged from hospital, she had no option but to live and sleep in her car. She went to BCC and was placed under the homeless prevention team. After spending the day at the council offices, she was sent in the evening to temporary accommodation, which was in extremely poor condition, and she must share the house with 4 other women. She was really scared and was left to get on with it which caused her mental health and anxiety to escalate to a very dangerous level.<br>She contacted us and said she had no one else to help her. She also has a 16-year-old son, who she is not able to have with her at the temporary accommodation. 'A' needs accommodation suitable for them to live |



© The Matthew Tree Project 2024

| | |
|---|---|
| | together. She has been on the waiting list for over a month with Missing Link domestic abuse service but has still not been contacted. |
| What they needed | Emotional Support, food aid, form filling, liaising and advocating with other organisations. She had been trying to liaise with her housing officer who repeatedly did not respond to her. |
| What we are doing for them | Liaising with BCC regarding her temporary housing. Providing food aid, gifts for her child and grandchildren, household goods, pans, cutlery, bedding and clothes. |
| Outstanding | Continuing to liaise with BCC to help 'E' move to a permanent safe and secure home. |
| Outcome | 'E' does not feel alone anymore which has helped her mental health condition. We are continuing to build a trusting relationship with E, she says she feels safe coming to us. |
| Comment | *"I don't think I would be here without your help; you are the ones that have done more for me than anyone else, I can't thank you enough, without you my son would not have his mother now. I do not go anywhere other than to come to you, as I feel so anxious to even leave the room. Thank you for offering me a safe and supporting place where I feel I can trust you and feel comfortable to come to, and for all the practical help as well, I didn't have any food, anything to cook in or eat with and you have helped so much with that and for your ongoing help with dealing with BCC. You are so wonderful" x* |

## OTHER LOCATION(S)

In addition to the Community Support Hub in Filwood and the urban food growing site in Brislington, The Matthew Tree Project also occupy the ground floor and second floor of Beech House in Almondsbury.

### Administration & Training Centre, Almondsbury, South Gloucestershire

*Left: The Matthew Tree Project occupy the Ground and 2nd Floor of Beech House, Almondsbury.*



© The Matthew Tree Project 2024

## RELATED PARTIES: RISE SOCIAL ENTERPRISE

The reason The Matthew Tree Project was established in 2010 is to:

"To relieve financial hardship amongst all peoples of all ages in the local communities in accordance with a Christian ethos whilst contributing towards the eradication of poverty in the UK, once and for all."

RISE Social Enterprise has been established in the furtherance of this objective.

The Matthew Tree Project wholly own Rise Social Enterprise Limited, a company limited by shares number 10740064. See WWW.RISESOCIALENTERPRISE.CO.UK for more information.

RISE SOCIAL ENTERPRISE was established in 2017 and is a wholly owned subsidiary of The Matthew Tree Project (www.the-matthew-tree-project.org), registered in England at Companies House, number 10740064.

RISE Social Enterprise objectives are to:

- Contribute towards the objects of The Matthew Tree Project by providing skills training and employment opportunities to clients of the charity.
- Contribute towards the objects of The Matthew Tree Project by improving physical and mental health of people on low incomes by making nutrient dense foods desirable and accessible.
- Contribute towards the overall objective of The Matthew Tree Project which is to eradicate poverty from the UK by using the evidence gathered from the frontline work of The Matthew Tree Project to affect systemic change through direct engagement with policymakers and other charities in the UK.
- Contribute towards the financial sustainability of The Matthew Tree Project by generating an annual surplus of funds to be given to the charity as a new income stream of unrestricted funding.

The concept behind RISE is to create a local not-for-profit food business model under our 'PURA' brand that teaches the critical importance of a nutrient dense diet for good physical and cognitive health and a longer life expectancy, and to make nutritionally dense foods accessible to those on the lowest incomes – the people who need it most. Importantly, the model will be good for the environment by promoting locally produced foods, reducing food miles and increasing food security, naturally grown fruits and vegetables without the use of pesticides, fertilizers, chemicals and responsibly reared animals without the use of growth hormones and excessive anti-biotics.



© The Matthew Tree Project 2024

Nutrition science is changing the way humans eat. The discovery of nutrients, vitamins, minerals and antioxidants has completely changed our eating habits. Along with advances in the food industry and changes over the past 50 years, nutrition has become a major public health issue but also one that leaves most people confused.

As we know, the growing number of overweight people worldwide is a real problem. Fifty years ago, only 3% of the population was obese, and today, that percentage has risen to 15%. Obesity was a rare disease only 50 years ago, but today it is one of the major issues in modern society. The statistics are really exploding, not to mention the links between bad eating habits and metabolic diseases (such as diabetes, cholesterol, hypertension, cardiovascular diseases, allergies, endocrine imbalance). There is now even talk of cases of non-alcoholic cirrhosis, a liver disease linked to an excessive rich diet. We should wonder how our diets have changed over the last 50 years to cause this shocking change.

Here is a list of the various changes between our dietary tendencies today and those of our parents and grandparents:

- The introduction of supermarkets and industrially processed products. High-processed and ultra-processed foods are accompanied by attractive packaging and advertising slogans that are appealing to consumers and highlight misleading hypothetical nutritional benefits to entice consumers to buy.
- The creation and expansion of fast-food restaurants.
- The emergence of the first dietary and nutritional recommendations led to a change in nutritional vocabulary. Since the introduction of nutritional science, it has been recommended to eat proteins, carbohydrates, vitamins, etc., and no longer real foods.

Given all these changes, it is easy to conclude that this type of diet is not suitable for humans. In addition, consumers are confused and don't understand what they need to do to eat well. As a result, healthy eating has become inaccessible for most people – especially those on the lowest incomes. People ask themselves questions such as: What should I eat? How much protein do I need per day? How many calories should I consume?

These questions are common today and are completely legitimate, as we have all been bombarded with conflicting information from the media, which makes it so unclear what we should or shouldn't do. In the past, our mothers passed on culinary knowledge and good eating habits. In recent decades, that role has been taken over by scientist, food manufacturers, and, to a lesser extent, the government, which enforces food guidelines, labelling rules, and dietary recommendations that nutritionists often criticize.

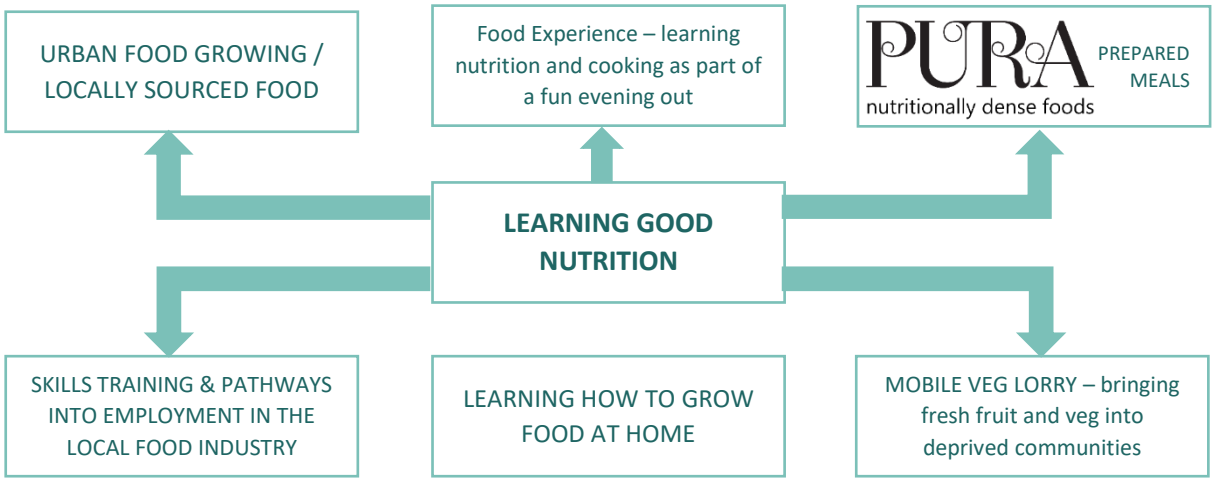
Today, we no longer eat what our grandparents ate. This is the first time in human history that such a monumental change has occurred so quickly and with so many implications on the way we eat.

We believe it is possible to make learning good eating habits logical and simple by talking about real, whole foods that are as unprocessed and as natural as possible. A healthy diet is simple, easy to implement, logical, and the objective of RISE Social Enterprise is to make it accessible to everyone.

The RISE business concept has learning the importance of good nutrition at its heart and from this foundation, providing connected services that enable and empower people to make consuming a good nutrient dense diet desirable and accessible.



© The Matthew Tree Project 2024



*Above top left: fresh fruit & veg lorry. Above top right: urban food growing site. Above bottom left: training and small batch production kitchen. Above bottom left: refrigerated van*

We are partnering with UWE and the Cranfield Trust to establish a sustainable and successful business model for this social change concept.

### UWE Social Hackathon

We are hosting the UWE Social Hackathon in November 2024 which includes UWE staff and up to 25 students at our premises in Almondsbury, for the entire event (likely to run from 10am to 4pm). The Hackathon presents the students with the business/social change concept as a challenge to develop ideas towards practical implementation which the students present at the end of the day.

This then links neatly into UWE's Student Consultancy Project run by UWE Bristol Business School. Group projects usually commence in late January and individual projects from April. They run between eight and 16 weeks, dependent on which course the student is registered on. This may involve



© The Matthew Tree Project 2024

undergraduate, post graduate or MBA students. Briefs for Business (group projects) are required by February 2025 and for Business (individual project) by January 2025. This provides time to consider and develop some of the ideas from the Social Hackathon in November to include in a brief for SCP.



© The Matthew Tree Project 2024

## CRANFIELD TRUST SUPPORT

Scope of Work:

The Matthew Tree Project ("TMTP") has applied to Cranfield Trust for support in preparing a Business Plan specifically for their wholly owned RISE social enterprise which was established in 2017 but had to downsize dramatically due to covid.

The volunteer will help TMTP to produce a Business Plan which will result in surplus revenue which can be reinvested for growth and be used to subsidise the charity's operations.

TMTP currently lacks the resources to carry out the Business Plan themselves, and although the charity has experienced consultants on their board and management teams, they would appreciate the perspective of an external consultant. A commercial plan is needed to provide a costed budget for a potential social enterprise which will provide a valuable service that competes with the private sector, whist also contributing towards TMTPs charitable objectives.

The volunteer will need to be able to scan the horizon for potential sources of funding and investment from foundations, philanthropists, and potential commercial partners. In the past, RISE has partnered with McDonalds and Boston Tea Party to provide training and employment opportunities but future partners for RISE do not need to be in the food / catering industry.

As well as having strategic development experience, the volunteer consultant would need to have experience of working with start-up companies or social enterprises. However, knowledge of the charity sector or charity fundraising is not necessary, or of homelessness. It is more important for TMTP for the volunteer to have strong business development skills in any sector, and to be driven by the prospect of exploring the possibilities with them for a successful social enterprise.

The charity would like to start the project as soon as the right volunteer consultant is available, and we anticipate that this will be in early 2024. The project is expected to take approximately 9-12 months but there is no fixed deadline – a long term and sustainable plan is more important than quick results. More details are per below at section 8 *Time commitment.*

Cranfield Trust usually aims to provide a local volunteer so that face to face meetings is possible, especially at the beginning of the project, however the project can also be delivered remotely or in a mixture of face to face and online meetings. In this case, the charity is keen for the volunteer to have the right mix of skills and experience so a volunteer based outside of Bristol or the South West would be no problem. The charity would be keen for a first meeting to be held face to face to establish the relationship. This meeting would be at Portbury in Somerset where the CEO and Chair currently hold a monthly face to face meeting. The charity has agreed to reimburse the reasonable expenses of the volunteer consultant, should expenses be incurred. Microsoft Teams works well for remote meetings as the CEO needs to be able to lipread.



© The Matthew Tree Project 2024

There will be some "homework" for the charity between sessions to gather information and do some focused research, and the consultant will advise on the best approach at each session, but this is expected to consist of the following (actual dates and deliverables to be agreed between the volunteer consultant and the Key Project Contact):

- an initial introductory kick off call with the Key Project Contact and Project Sponsor and others as needed to discuss the work already done in this area, to agree an appropriate action plan for the project, to agree the process and timetable to completion, and the roles and responsibilities of staff, the board and the volunteer.
- approx. 1-2 sessions per month to progress the project.
- a draft outline of the Business Plan for review by the board at the next available board meeting (date TBC), and updates at subsequent meetings
- interim emails to discuss progress, provide any missing information and ensure the project is on track for completion by the agreed date.
- presentation of a draft Business Plan to the board for approval
- revisions and completion of the Plan
- a wrap up meeting to agree any next steps.

Should an additional standalone project result from the process, for example, a Marketing Plan, this will be treated as a new project and subject to availability, could be managed by the same volunteer or another volunteer if such a project requires different specialist skills.

The charity can share relevant information with the volunteer ahead of starting the project, and the volunteer can also review information in the charity's latest annual report and on their website and social media accounts to understand the organisation's ethos.

Expected Deliverables:

A Business Plan for RISE with options for the board to consider.

Overall Impact:

The success of RISE will add an extra dimension to the impact The Matthew Tree Project has on the community it serves. It will provide an additional income stream but also employment, training and skills opportunities which align with the objects of the charity.



© The Matthew Tree Project 2024

# CASE STUDY: DEBT / HOUSING / / HEALTH / CHILD POVERTY

| | |
|---|---|
| Reason for referral | Unmanageable debt / housing / child poverty |
| Referred by | Missing Link |
| Situation | 'P' is a mother to 2 small children: 5yr & 6 yr old boys.<br>She fled domestic violence in December (2022) and was housed in temporary accommodation for a year. This has now become a permanent home. The house is very damp with significant mould, broken doors, and lack of insultation. 'P' suffers with fibromyalgia and severe trauma and mental health due to the domestic violence. Her 6-year-old son is severely autistic and has been diagnosed with SLOS (Smith-Lemli-Opitz Syndrome).<br>Even though Bristol City Council housed the family in a 3-bedroom property due to her son's illness /condition, she has been forced to pay bedroom tax for one of the bedrooms since moving in.<br>Her sons need separate bedrooms due to her 6-year-olds condition as this significantly disrupts her other son.<br>Her sons DLA (disability living allowance) was stopped because 'P' was late with her renewal application due to her mental health/capacity. This is now being appealed against.<br>In addition, her violent ex-partner took out a £6,000 loan and put 'P' as guarantor. The loan has not been paid and 'P' is now being chased by the debt collection agency. |



© The Matthew Tree Project 2024

| | |
|---|---|
| What is needed | • Help with unmanageable debt.<br>• Help to make the home accessible due to health and disability conditions. |
| What we are doing for 'P' | • Contacted debt agency and are working with our partner, Step Change, regarding the outstanding loan debt.<br>• Contact BCC to get adaptions and repairs completed to the property, including a walk-in shower, and ramp to the property to enable 'P' to use her mobility scooter. BCC has agreed to carry out the works, but to date have not completed. Continuing contact.<br>• Regular food aid.<br>• Provided radiator insulation (all radiators are situated on walls that are external), a dehumidifier to assist with the damp & mould, door draught excluders and an electric blanket for 'P' to use to keep heating costs down. |
| Comment | *"Thanks for helping us, I struggle to talk on the phone to the council as I don't think they care or want to listen. I do get angry and having you ring on my behalf I feel will really help with everything. The food is helping enormously and the things you have given me to help with energy and the home are helping so much. Thank you."* |



© The Matthew Tree Project 2024

## AWARDS

The work of the charity with its central and unique empowering 'Rebuilding Lives Crisis Support' model continues to win awards and receive national and international praise and recognition, which include:

- Innovation & Excellence Award Winner for '**Crisis Support NPO of the Year**' 2023
- AI Non-profit Organisation Award **'Most Empowering Crisis Support Programme'** 2023
- Corporate Live Wire **Global Award** for '**Crisis Support NPO of the Year**' 2023/24
- South West England Prestige Award for **'Crisis Support NPO of the Year' 2023/24 (picture left)**

## NATIONAL RECOGNITION

**New: Approved Referrer to Children in Need Essentials Family Fund**

One of the recurring and most pressing 'needs' people have, is for a crisis grant and/or essential household items. **The Matthew Tree Project is now an approved referrer to the Children in Need Essentials Family Fund** which enables us to secure a range of essential items for households with children.

**New: Strategic Partnership with Marmalade Restaurants, the Fishponds McDonald's franchise owner**

Helping people into employment has always been a key element of our work, and this year we have been successful in the **development of a key strategic partnership with large employer, McDonalds (Fishponds)** where clients looking for work, often many years unemployed, are 'given a chance' and are supported in their re-integration into the workplace by the employer and The Matthew Tree Project.

**New: WARM HOMES PROJECT funded by the National Grid**

The Matthew Tree Project has been successful in securing funding that will enable the charity to deliver a comprehensive Warm Homes Support Service to vulnerable households. Launching in January 2024 the service will include **Energy advice to clients:** provide advice and support to clients via drop-in sessions or appointments. Advice will include how to use heating systems properly, managing debt, energy saving and accessing benefits. How to obtain PPM vouchers and financial support for those paying by DD or quarterly is included. Home Visit Assessment and how to address damp and mould is offered together with 'Warm Home Packs'.



© The Matthew Tree Project 2024

**International recognition has been achieved by way of THE CEO PUBLICATION, based in New York, USA**, in their 25th edition featuring the 'Top 20 Dynamic CEOs of 2024', recognising our founder and CEO, Mark Goodway, as one of the top 20 dynamic CEOs from the UK based on his work with The Matthew Tree Project. This award will be announced in March 2024 and will highlight the unique work of The Matthew Tree Project (theceopublications.com).

**National recognition has been achieved by way of an MBE** awarded to Mark Goodway, Founder & CEO of The Matthew Tree Project, in the Kings Birthday Honours List, June 2023 for Services to Charity and to Disadvantaged People. Mark accepted the honour on behalf of the hundreds of people who have been involved with, and have supported The Matthew Tree Project since 2010, without which none of this would have been possible.

**ITV News** Upon announcement of the honour, featuring Mark: (https://youtu.be/XEDDQ9w9sjI?feature=shared),

**Bristol Post,** featuring Mark: (https://www.bristolpost.co.uk/news/bristol-news/marks-tireless-commitment-eradicating-poverty-8525997



© The Matthew Tree Project 2024

## TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS

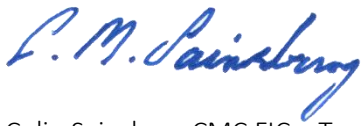
The trustees (who are also directors of The Matthew Tree Project for the purposes of company law) are responsible for preparing the Trustees' Report (incorporating the strategic report and directors' report) and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that 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 financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Trustees on ……5/09/2024……and signed on their behalf by:



Colin Sainsbury CMC FIC – Trustee Chair
5 September 2024

## INDEPENDENT EXAMINERS REPORT

**Independent examiner's report to the trustees of The Matthew Tree Project**

I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 December 2023.

**Responsibilities and basis of report**

As the charity's trustees of the Company (and its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

**Independent examiner's statement**

Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of the 'Association of Accounting Technicians', which is one of the listed bodies.

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

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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

Andy Forse FMAAT
Causeway Accountancy Services
1st Floor Office
788 Fishponds Road
Bristol BS16 3TE

Date: .....4/09/2024.....

## FINANCIAL ACCOUNTS 2023

| | NOTE | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2023 £ | Total Funds 2022 £ |
|---|---|---|---|---|---|
| **Income from:** | | | | | |
| Donations | | 45,582.77 | 45,841.83 | 91,424.60 | 221,089.63 |
| Grants receivable | | 112,529.98 | 101,076.00 | 213,605.98 | 81,620.00 |
| Charitable activities | | 0 | 0 | 0 | 0 |
| Other sources | | 5,014.92 | 0 | 5,014.92 | 5,008.14 |
| **Total income** | | **163,127.67** | **146,917.83** | **310,045.50** | **307,717.77** |
| **Expenditure on:** | | | | | |
| Raising funds | | 4,636.32 | - | 4,636.32 | 4,875.90 |
| Charitable activities | 2 | 63,137.70 | 205,207.50 | 268,345.20 | 387,487.70 |
| **Total expenditure** | | **67,774.02** | **205,207.50** | **272,981.52** | **392,363.60** |
| **Net income/(expenditure) and net movement in funds** | 3 | 95,353.65 | (58,289.67) | 37,063.98 | (84,645.83) |
| **Total funds at 1 January 2023** | 10 | **173,326.31** | **90,590.22** | **263,916.53** | **348,562.36** |
| **Total funds at 31 December 2023** | 10 | **268,679.96** | **32,300.55** | **300,980.51** | **263,916.53** |

There are no recognised gains or losses other than the results for the year as set out above.

All activities are classed as continuing.

Fund-accounting comparative transactions are shown in note 4.

| | NOTE | 2023 | 2022 |
|---|---|---|---|
| | | £ | £ |
| **Fixed assets** | | | |
| Tangible fixed assets | 6 | 20,147.64 | 26,863.52 |
| Investments | 7 | 1.00 | 1.00 |
| | | 20,148.64 | 26,864.52 |
| **Current assets** | | | |
| Debtors | 8 | 10.00 | 0 |
| Food stocks | | 6,103.76 | 4,623.70 |
| Rise loan account | | 222,775.98 | 245,586.76 |
| Cash at bank | | 79,885.67 | 16,108.47 |
| | | 308,775.41 | 266,318.93 |
| **Creditors: amounts falling due within one year** | 9 | - 27,943.54 | - 29,266.92 |
| **Net current assets** | | 300,980.51 | 263,916.53 |
| Restricted and unrestricted funds | | | |
| Unrestricted funds | 11 | 268,679.96 | 204,992.98 |
| Restricted funds | 11 | 32,300.55 | 58,923.55 |
| **Total funds** | | 300,980.51 | 263,916.08 |

| | | 2023 | | 2022 |
|---|---|---|---|---|
| **Net cash flow from operating activities** | | 63,777.20 | | (45,921.65) |
| **Non-operational cash flows:** | | | | |
| **Investing activities** | | | | |
| Investment income | | 0 | 0 | 0 |
| Payments for tangible fixed assets | | 0 | 0 | 0 |
| **Net cash inflow/(outflow) for the year** | A | 63,777.20 | | (45,921.65) |

**Cashflow Restrictions**
Charity law prohibits the use of net cash inflows on any endowed or other restricted fund to offset net cash outflows on any fund outside its own objects, except on special authority. In practice, this restriction has not had any effect on cash flows for the year.

**A Analysis of changes in cash during the year**

| | 2023 | 2022 | Change |
|---|---|---|---|
| | £ | £ | £ |
| Cash at bank and in hand | 79,885.67 | 16,108.47 | 63,777.20 |

**B Analysis of changes in net debt**

| | At 01-Jan-23 | Cash flows | Non cash flows | At 31-Dec-23 |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| Cash and cash equivalents | | | | |
| Cash | 16,108.47 | 63,777.20 | | 79,885.67 |
| **Total** | 16,108.47 | 63,777.20 | | 79,885.67 |

## 1 Accounting Policies

a) The financial statements have been prepared in accordance with the Charities Act 2011, the Companies Act 2006, Financial Reporting Standard FRS102, and the Charities' Statement of Recommended Practice (FRS102). Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy note(s).
The charity meets the definition of a public benefit entity under FRS102.
The trustees consider that the charity is able to continue as a going concern for at least the next twelve months. Please refer to the trustees' consideration in the Trustees' Report.
b) Income from donations is included when it is receivable, except as follows:

I. When donors specify that donations given to the charity must be used in future accounting periods, the income is deferred until those periods;
II. When donors impose conditions, which have to be fulfilled before the charity becomes entitled to use such income, the income is deferred until the pre-conditions have been met.

c) Gifts in kind includes donated services and facilities which are recognised at a reasonable estimate of their gross value to the Charity. An equivalent amount has been included as expenditure under the appropriate heading in the Statement of Financial Activities.
d) Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure includes attributable VAT, which cannot be recovered.
e) Grants payable is charged in the year when the offer is conveyed to the recipient except in those cases where the offer is conditional, such grants being recognised when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the year-end are noted as a commitment, but not accrued as expenditure.
f) Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition.
Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value, over the useful economic life of that asset as follows:

| | |
|---|---|
| Equipment | 5% per annum on a reducing balance basis |
| Office equipment, furniture and fixtures | 5% per annum on a reducing balance basis |
| Motor vehicles | 5% per annum on a reducing balance basis |

g) Cash at bank includes cash and short-term highly liquid investments with a notice of withdrawal period of three months or less.
h) Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.
i) Creditors are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.
j) Unrestricted funds can be used in accordance with the charitable objects at the discretion of the trustees.

l) Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. Expenditure which meets these criteria is charged to the fund, together with a fair allocation of management and support costs. Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

## 2 Costs of activities in furtherance of charity's objectives

| | Total Funds 2023 £ | Total Funds 2022 £ |
|---|---|---|
| **Direct costs** | | |
| Food costs | 44,361.77 | 216,677.79 |
| Premises | 16,118.21 | 1,585.13 |
| Salaries | 90,041.22 | 82,369.89 |
| Other staff costs | 3,649.94 | 370.61 |
| Strategic partner grants | 0 | 0 |
| Hardship grants | 367.95 | 0 |
| | 154,539.09 | 301,003.42 |
| **Support costs** | | |
| Salaries | 34,183.02 | 69,967.02 |
| Printing and stationery | 859.73 | 589.42 |
| Meeting costs | 1,050.96 | 634.20 |
| IT costs | 1,881.21 | 1,226.46 |
| Motor and travel expenses | 3,287.26 | 6,208.15 |
| Depreciation | 6,715.88 | 7,218.44 |
| Miscellaneous expenses | 41.20 | 133.87 |
| **Governance costs** | | |
| Legal and professional fees | 65,606.85 | 326.72 |
| Accountancy & Independent examiner's fee | 180.00 | 180.00 |
| | 113,806.11 | 86,484.28 |
| | 268,345.20 | 387,487.70 |

## 4 Fund-accounting comparative figures

| | General Funds £ | Restricted Funds £ | Total Funds 2023 £ |
|---|---|---|---|
| **Income from:** | | | |
| Donations | 45,582.77 | 45,841.83 | 91,424.60 |
| Grants receivable | 112,529.98 | 101,076.00 | 213,605.98 |
| Charitable activities | - | - | - |
| Other sources | 5,014.92 | - | 5,014.92 |
| **Total income** | 163,127.67 | 146,917.83 | 310,045.50 |
| Expenditure on: | | | |
| Raising funds | 4,636.32 | - | 4,636.32 |
| Charitable activities | 63,137.70 | 205,207.50 | 268,345.20 |
| **Total expenditure** | 67,774.02 | 205,207.50 | 272,981.52 |
| **Net income/(expenditure) and net movement in funds** | 95,353.65 | (58,289.67) | 37,063.98 |
| **Total funds at 1 January 2023** | 173,326.31 | 90,590.22 | 263,916.53 |
| **Total funds at 31 December 2023** | 268,679.96 | 32,300.55 | 300,980.51 |

## 5 Salaries

| | 2023 £ | 2022 £ |
|---|---|---|
| Salaries, National Insurance & Staff Pension | 124,224.24 | 158,141.90 |
| | 124,224.24 | 158,141.90 |

## 6 Tangible Fixed Assets

| | Equipment | Office equipment, fixtures & fittings | Motor vehicles | Total |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| **Cost** | | | | |
| At 1 January 2023 | 69,254.86 | 24,388.09 | 13,797.49 | 107,440.43 |
| Additions | | | | |
| At 31 December 2023 | 69,254.86 | 24,388.09 | 13,797.49 | 107,440.43 |
| **Depreciation** | | | | |
| At 1 January 2023 | 49,127.33 | 19,179.88 | 12,269.70 | 80,576.91 |
| Charge for the year | 5,031.89 | 1,302.05 | 381.95 | 6,715.88 |
| At 31 December 2023 | 54,159.22 | 20,481.93 | 12,651.65 | 87,292.79 |
| **Net book value** | | | | |
| **At 31 December 2023** | **15,095.64** | **3,906.16** | **1,145.84** | **20,147.64** |
| At 31 December 2022 | 20,127.52 | 5,208.21 | 1,527.79 | 26,863.52 |

## 7 Investments

| | 2023 | 2022 |
|---|---|---|
| | £ | £ |
| 100% holding in subsidiary | 1 | 1 |

RISE Social Enterprise Ltd (company number 10740064) is a subsidiary of the charity. At the end of the year, the company owed The Matthew Tree Project £222,775.98 (2021: £245,586.76).

## 8 Debtors

| | 2023 | 2022 |
|---|---|---|
| | £ | £ |
| Rental deposits | 0 | 0 |
| | 0 | 0 |

## 9 Creditors falling due within one year

| | 2023 | 2022 |
|---|---|---|
| | £ | £ |
| Creditors | 1.00 | 1.00 |
| PAYE and NI, salaries | 27,942.54 | 29,265.92 |
| | 27,943.54 | 29,266.92 |

## 10 Movement in funds

| | At 1 Janaury 2023 | Income | Expenditure | Transfers | At 31 December 2023 |
|---|---|---|---|---|---|
| | £ | £ | £ | £ | £ |
| **Restricted funds** | | | | | |
| Warmer Homes Project | - | 9,953.00 | 2,488.25 | - | 7,464.75 |
| Rebuilding Lives | 31,666.67 | 157,000.00 | 169,934.63 | - | 18,732.04 |
| Children Essentials Fund | - | 10,000.00 | 10,000.00 | - | - |
| Designated funds; Food stock funds | 4,623.70 | 45,841.83 | 44,361.77 | - | 6,103.76 |
| | 36,290.37 | 222,794.83 | 226,784.65 | - | 32,300.55 |
| Unrestricted general funds | 227,626.16 | 87,250.67 | 46,196.87 | - | 268,679.96 |
| Total funds | 263,916.53 | 310,045.50 | 272,981.52 | - | 300,980.51 |

Unrestricted funds are available to be used at the discretion of the trustees in line with the charity's purposes.

Designated funds - The Food Stock fund represents gifts of food received during the year and food distributed to those in need. The balance at the end of the year is the value of food stocks held by the charity

## 11 Analysis of Net Assets Between Funds

| | Tangible Fixed Assets | Other Net Assets | Total Funds 2023 |
|---|---|---|---|
| | £ | £ | £ |
| Restricted funds | | 32,300.55 | 32,300.55 |
| Unrestricted funds | 20,148.64 | 248,531.32 | 268,679.96 |
| | 20,148.64 | 280,831.87 | 300,980.51 |

| Prior Year | Tangible Fixed Assets | Other Net Assets | Total Funds 2022 |
|---|---|---|---|
| | £ | £ | £ |
| Restricted funds | | 36,290.37 | 36,290.37 |
| Unrestricted funds | 26,864.52 | 200,761.64 | 227,626.16 |
| | 36,864.52 | 237,052.01 | 263,916.53 |

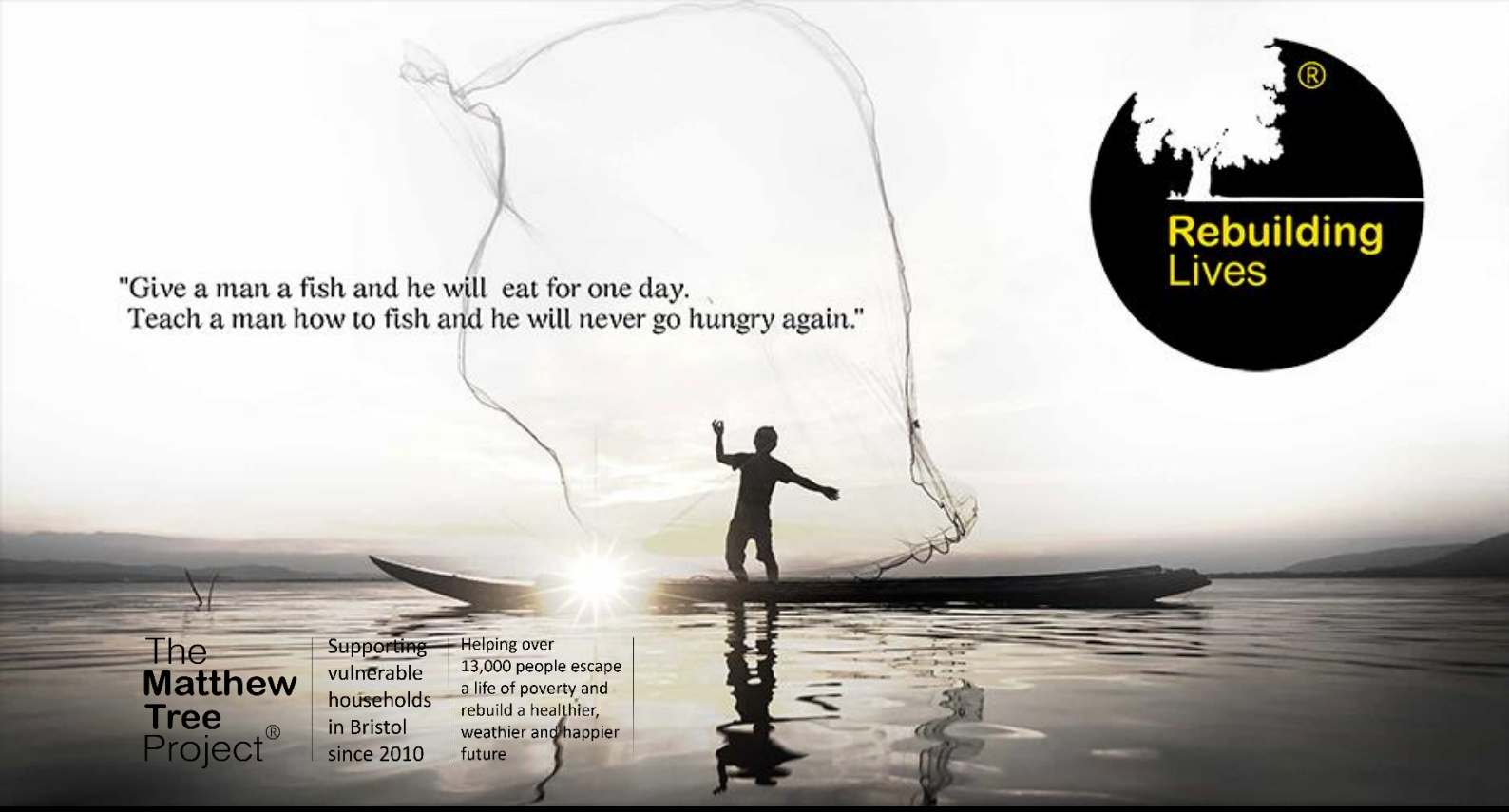
## 12 Related parties

There were no related party transactions during this, or the prior year, other than those noted elsewhere in the accounts. No trustees received or waived expense payments during either the current, or previous year.

**THE MATTHEW TREE PROJECT**

England & Wales - Charity number 1146401

# Accounts




FIGHTING TO ERADICATE POVERTY FROM THE UNITED KINGDOM

# ANNUAL REPORT FOR THE YEAR ENDED 31 DECEMBER 2022

Registered charity number: 1146401

Company number: 07324296

2023 Non-Profit Organisation Awards WINNER
THE MATTHEW TREE PROJECT
Most Empowering Crisis Support Programme 2023

GLOBAL AWARDS 2022/23 WINNER
CRISIS SUPPORT NPO OF THE YEAR

# Contents


OFFICERS AND PROFESSIONAL ADVISORS ..... 4
REPORT OF THE TRUSTEES ..... 5
STRUCTURE, GOVERNANCE AND MANAGEMENT ..... 5
RISK MANAGEMENT ..... 5
OBJECTIVES AND ACTIVITIES FOR THE PUBLIC BENEFIT ..... 5
RESULTS FOR THE YEAR ..... 5
RESERVES POLICY ..... 6
GOING CONCERN ..... 6
SHOCKS DUE TO COVID-19 PANDEMIC AND ITS LEGACY ..... 6
OUTLOOK ..... 6
SERVICE DELIVERY SUMMARY ..... 7
BENEFICIARIES ..... 8
Numbers ..... 8
Client age groups ..... 8
CASE STUDIES (Sample) ..... 9
Suffering illness / older person ..... 9
LGBTQ ..... 10
Ethnic Minorities / Family – children from disadvantaged background ..... 11
Single Mum – children from disadvantaged background ..... 12
Disability / older person / illness ..... 13
LOCATION(S) ..... 14
Community Support Hub, Filwood ..... 14
Urban Food Growing Site, Brislington ..... 14
Administration Centre, Bradley Stoke, South Gloucestershire ..... 15
ACTIVITIES ..... 15
One-2-One Weekly Support Package Elements: ..... 15
Specialist Services, introduced as required include (funded separately): ..... 15
Group Activities: ..... 16
Food Appeal Collections ..... 16
Children's Christmas Present Appeal ..... 16
Community Meal Celebration ..... 17
Name the Bear Easter Competition. ..... 17
OUTCOMES ..... 18
Reported changes (over a period of at least 6 weeks) ..... 19

RELATED PARTIES ..... 20
AWARDS ..... 20
NATIONAL RECOGNITION ..... 20
TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS ..... 21
INDEPENDENT EXAMINERS REPORT ..... 22
FINANCIAL ACCOUNTS 2022 ..... 23

## OFFICERS AND PROFESSIONAL ADVISORS

TRUSTEES who have served during the year and up until the date of signing the report are:
Nigel Goodway, Roger Wooldridge, Jonathan Evans, Colin Sainsbury.

New appointed trustees are:
Susan Brooks appointed on 26 October 2023; Tina Hammond appointed on 26 October 2023.

### INDEPENDENT MANAGEMENT ADVISOR

Anstey Barton Consulting
Huntsham
Tiverton
EX16 7NG

### INDEPENDENT HR ADVISOR

BrightHR
Peninsula Consulting
Victoria Place
Manchester M4 4FB

### FINANCIAL OFFICER

Sue McQuaid
Libra Accounting Services Ltd
54 Petherton Gardens
Hengrove, Bristol BS14 9BS

### INDEPENDENT SAFEGUARDING ADVISOR

Thirtyeight:one
PO Box 133, Swanley
Kent
BR8 7UQ

### BANKERS

HSBC Bank plc
431 Oxford Street
London
W1C 2DA

### INSURERS

Zurich Insurance plc
The Zurich Centre
3000 Parkway
Whiteley, Fareham PO15 7JZ

### PRINCIPAL & REGISTERED OFFICE OF THE CHARITY

10 Filwood Broadway
Knowle
Bristol
BS4 1JL

### ADMINISTRATION CENTRE OF THE CHARITY

Ground Floor & 2nd Floor
Beech House, Brotherwood Court, Almondsbury
South Gloucestershire
BS32 4QW

### INDEPENDENT ACCOUNTS EXAMINER

Andy Forse FMAAT
Causeway Accountancy
279 Lodge Causeway
Bristol BS16 3RA

### IMPACT MONITORING ADVISORS

Clarity CIC
The Old Bakery, Old Road
Harbertonford
Totnes TQ9 7TA

apricot™ CASE MANAGEMENT SOFTWARE

Fully integrated bespoke case management and impact monitoring system designed on the APRICOT® software platform and underpinned by The Matthew Tree Project 'Theory of Change Framework'.

## REPORT OF THE TRUSTEES

The Board of Trustees present their annual report and the independently examined financial statements for the year ended 31 December 2022. These are prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Trust Deed, 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) and Financial Reporting Standard 102 and the Companies Act 2006.

## STRUCTURE, GOVERNANCE AND MANAGEMENT

The Mathew Tree Project was established in July 2010 and is a registered charity, number 1146401. The charitable Trust is registered as a company limited by guarantee, as defined by the Companies Act 2006. The governing document is its Memorandum and Articles of Association and is registered in England (company number 7324296).

The Charitable Company has no share capital, but under the terms of the Memorandum of Association, every member is liable to contribute a sum not exceeding £10 in the event of the Charitable Company being wound up.

The principal objects of the Charitable Company are:

"To relieve financial hardship amongst all peoples of all ages in the local communities in accordance with a Christian ethos whilst contributing towards the eradication of poverty in the UK, once and for all."

## RISK MANAGEMENT

The Trustees confirm that they regularly review the significant risks facing the Trust and have systems and procedures in place to mitigate those risks. The risk policy has adopted a risk mapping methodology that is applied to each identified risk, assessing the likelihood of it occurring and the severity of the impact of occurrence on the Trust.

## OBJECTIVES AND ACTIVITIES FOR THE PUBLIC BENEFIT

The Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission when exercising their powers and duties.

## RESULTS FOR THE YEAR

The charity received income for the year of £307,717, (2021: £625,644), including £186,659 (2021: £389,117) of food gifts for distribution to those in need. Expenditure for the year was £392,363 (2021: £659,329).

## RESERVES POLICY

The trustees aim to hold no more than £50,000 of free reserves. Any funds over this level are reinvested in the development of client services. At the end of the year, free reserves were £16,108, and at the end of 2021 free reserves were £34,530. Since the end of 2022 the financial position of the charity has improved. At the end of July 2023, free cash reserves stood at £40,093.

## GOING CONCERN

After making enquiries, the Trustees have a reasonable expectation that the Trust has adequate resources to continue its objectives and activities for the public benefit for the foreseeable future. Accordingly, they continue to adopt the going concern basis in preparing the annual report and financial statements.

Further details regarding the adoption of the going concern basis are in note 1 'Accounting Policies' in the financial statements.

## SHOCKS DUE TO COVID-19 PANDEMIC AND ITS LEGACY

Critical crisis support services were provided by The Matthew Tree Project throughout, and since Covid, as the charity is regarded as a provider of key frontline emergency support services for low income and vulnerable households. Covid-19 sharply increased demand on the charity, which continued after it was declared 'over' and significantly increased operational costs.

The period from Q3 2021 to Q2 2023 has been extremely challenging from a financial perspective. Due to a significant drop in funding, caused by several multi-year funding awards coming to an end and a general reduction in charity sector funding in the wake of the Covid crisis, the charity had to downsize and reduce operational costs to survive. This has been achieved in part by reducing our geographic reach. At Q3 2021 the charity was delivering the Rebuilding Lives Programme from five community hubs across Bristol and South Gloucestershire. Now we deliver the full programme from our main community support hub in Filwood (face-2-face) and provide what support we can remotely for those who are unable to get to our Filwood hub. To help us through this period we had to use our reserves and they reduced from £34k to £16k by the end of 2022.

We have been negatively impacted, not only by the cost-of-living crisis but also by the reduced funding in the charity sector.

## OUTLOOK

It appears that since Q2 2023 more funding is becoming available for the type of crisis support work The Matthew Tree Project delivers, and we continue to work harder than ever to secure the funds we need to recover from the shocks of the previous 3 years.

Since February 2023, funding applications submitted, where decisions have been received, value £280,101 and we have received awards in the amount of £130,101 which is a conversion success rate of 46%. This is the highest conversion rate the charity has ever achieved in its 13-year history.

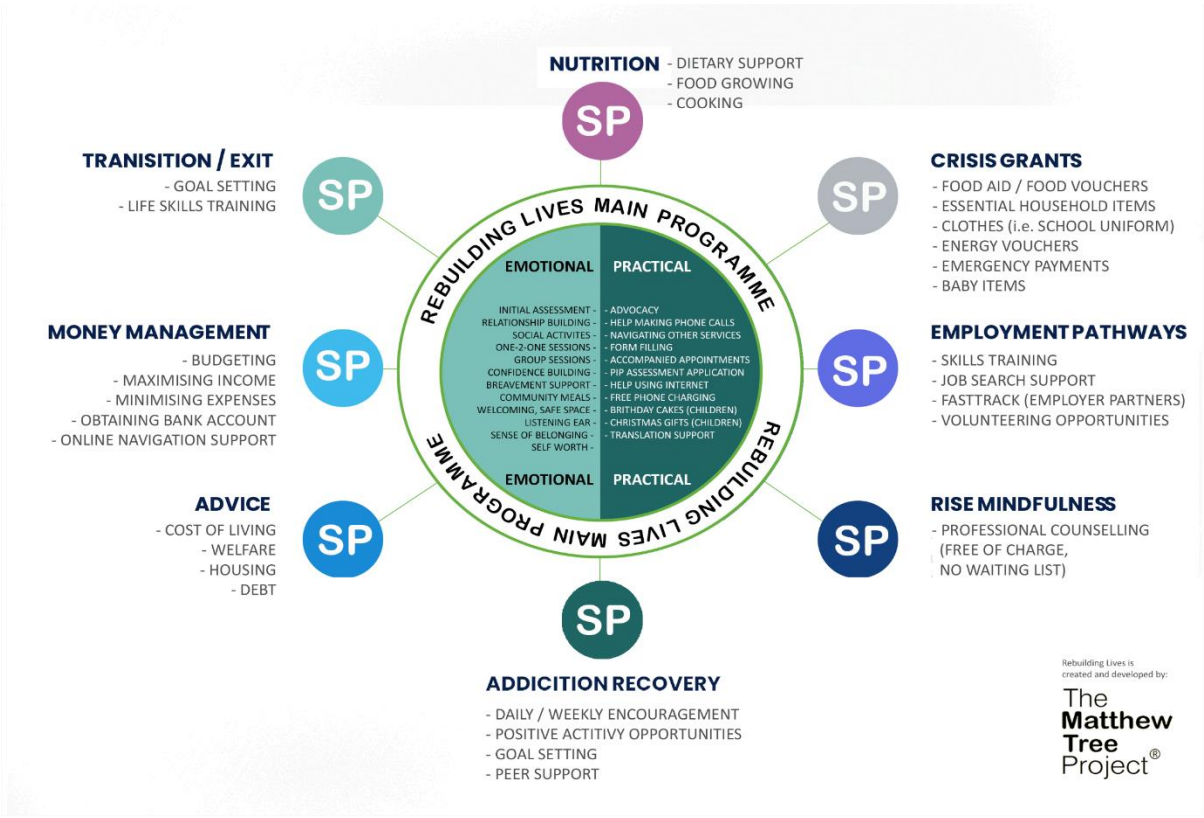
*Throughout 2023 the financial position of the charity has improved. At the end of July 2023, the balance sheet value has increased from £263,916 to £310,697.

We are feeling more confident for the future than we have since Q3 2021 and have valid reason to believe that by continuing to do what we are doing the charity will continue to recover financially from what has been a very challenging period.

## SERVICE DELIVERY SUMMARY

Due to the financial constraints the charity has faced over the past 18 months and the changing needs of the people the charity serves, less resource has been committed to the costly distribution of food aid and a much greater focus has been given to improving the scope and effectiveness of support we provide in helping people overcome the underlying causes of their crisis and empowering people to rebuild a happier, healthier, and better future for themselves.

Despite the financial challenges, it is immensely satisfying that we have been able to continue to develop the impact and effectiveness of our unique Holistic Crisis Support Programme - Rebuilding Lives which consists of a central 'main programme' fully and seamlessly integrated with separately funded specialist services that together provide a wide range of ***expertly joined-up service elements together to create a unique and personally tailored 'full support package'*** around each vulnerable household in the programme, as shown by the diagram below.




The Rebuilding Lives Programme is shaped by the people it serves and has been continuously developed into a 'gold standard' service over the last 13 years. The key element of the programme is in the building of trusted relationships that are maintained throughout the client's journey through the programme by the well trained and expertly supervised 'frontline Team.' The Rebuilding Lives Programme is skilled in identifying the underlying causes, challenges, and barriers to progress people are experiencing, agreeing

with them how to find a way to overcome the issues they face, and putting in place the 'tools' people need to rebuild a happier, healthier, better future.

**Rebuilding Lives** is a unique, holistic crisis support programme that engages on a long-term basis to (a) stabilise the immediate crisis; (b) provide substantive change; and (c) enable long-term transformational change.

We have a well-established and large network of over 90 statutory and non-statutory organisations who are approved and set up to refer vulnerable households to us via our secure online referral portal, Apricot. The link can be accessed via our web site 'REFER CLIENT' tab here: https://the-matthew-tree-project.org/). We also accept self-referral. This often comes by way of another group signposting people to us or one client telling someone they know to be struggling: a neighbour, friend, or family member, about the programme and their positive experience of it. Self-referral can happen in person, someone simply walking in, or we do get quite a high number messaging us via Facebook.

The Rebuilding Lives Programme is open to all. No-one is excluded. Referral criteria is that there is not enough income to cover essential bills such as food, fuel, and rent. Over 60% of referrals are at risk of becoming homeless. Our initial focus is to stabilise the immediate crisis and then to explore ways to maximise income and minimise expenditure. We take a 'whole person' holistic approach.

***The lack of food or fuel is a signal that there are deeper problems. Rebuilding Lives is an early intervention programme, preventing homelessness by engaging with the vulnerably housed before it is too late.*** It is a Truly Holistic Tripartite Crisis Support Service addressing the multiple and complex underlying causes as well as the effects of poverty, ***characterized by the treatment of the whole person, considering 1) mental, 2) physical, and 3) social factors, rather than just the symptoms.***

## BENEFICIARIES

Because the Rebuilding Lives Programme is open to anyone in crisis, we have several clients from marginalised groups e.g., LGBTQ+; ethnic minorities; children and young people from disadvantaged backgrounds; people with disabilities; people suffering illness and disease; offenders and ex-offenders; and elderly people.

Rebuilding Lives is an early intervention programme, preventing homelessness by engaging with the vulnerably housed before it is too late.

| Numbers | |
|---|---|
| Number of people supported | 10481 |
| Adults | 54.1% |
| Children | 45.9% |
| **Client age groups** | |
| 16-25 | 9.0% |
| 26-40 | 40.6% |
| 41-60 | 40.0% |
| 61+ | 10.4% |

## CASE STUDIES (Sample)

| Beneficiary type | Suffering illness / older person |
|---|---|
| DP | 'DP' is a 66-year-old lady we have been supporting since July 2023. 'DP' struggles with her mental health, depression, and anxiety, also struggles physically and needs a ground floor flat.<br>'DP's mental health has recently been exacerbated due to her living conditions, her neighbours have been abusing her and threatening her life and she fears every time she steps out of her flat. |
| Reason for referral | Help with moving home & debts, cost of living |
| Referred by | Self-referral – recommended by previous client |
| Activities – what we did | • Set up email address and set up home-choice account.<br>• Weekly bidding on home-choice.<br>• Liaised with her housing officer to request increase in her housing band to improve chances of a successful bid to be able to move.<br>• Pension credit application.<br>• Private pension plan contacted to request withdrawal of monies.<br>• Worked with Step change to sort out debts and look at different options.<br>• Food<br>• Emotional Support |
| Outcomes | • Successful increase to band 2 with her home-choice<br>• Debt repayment plan in place for managed debt repayments<br>• Pension credit awarded.<br>• Successful bid on a new flat awarded and 'D' will be moving next week (w/c 25 September 2023). |
| Next steps | Will continue support and assist 'DP' with any household goods required for her new flat |
| Client Comment | *"I didn't realise how much you would be able to help me, and I am overwhelmed with what you have helped me achieve. Coming to you has changed my life and given me a shoulder to cry on when needed, thank you so much for all your support I'm so grateful."* |

| Beneficiary type | LGBTQ |
|---|---|
| TA | 'TA' is a 39-year-old single male, who suffers with depression and anxiety and has trouble with his neighbours, who he believes are abusive to him because is a gay man. He also has a difficult relationship with his housing rental landlord/company. He finds communication with organisations challenging. |
| Reason for referral | Low income and debt |
| Referred by | Rework |
| Activities – what we did | • Food<br>• Emotional Support<br>• Assisted with applying for, and securing job after 11 years unemployment.<br>• Financial support (bus fare) to be able to get to his new job when he first started.<br>• Provided a bike for travelling to work.<br>• Advocated with his landlord with outstanding works on his property.<br>• Advocated with energy companies |
| Outcomes | • Successfully secured 'TA' a job with one of our strategic employer partners who provide supportive employment and ongoing support (McDonalds, Fishponds)<br>• Reduced energy bills<br>• Improved TA's living accommodation |
| Next steps | We continue to work closely with TA and McDonalds to help TA is to hold down the job and become fully integrated back into the work market. There have been challenges which McDonalds and TMTP have helped TA with. TA is working 15 hours a week but needs more hours, so he can fully support himself. We are helping TA secure the hours he needs, either at McDonalds or with second part-time position elsewhere. |
| Client Comment | *"I feel like you are the only one that has helped me, you helped me to get a job after not working for 11 years. You support me so much and I feel listened to. I am struggling with the cost of living and any money I have goes on gas and electric and without the food help you give me I would not be eating."* |

| Beneficiary / Type | Ethnic Minorities / Family – children from disadvantaged background |
|---|---|
| SS | 'SS' is a 66-year-old man, married with 6 children, aged 1, 4, 10, 14, 16, and 18 yrs. When he first became a client, the family didn't have enough money for food. His wife had recently had a baby and was not able to feed her baby because she was not eating herself, due to lack of money. The children did not have enough clothing and they lacked many basic household goods. Due to his limited English 'SS' didn't understand communications from authorities and was constantly sanctioned and left with little to no money. |
| Reason for Referral | Benefit Delays / Low income |
| Date | November 2022 – May 2023 (case closed) |
| Referral from | A mother at the children's school |
| Activities<br>Removing barriers | • When 'SS' first came, he spoke very little English, originally from Senegal, also lived for many years in Portugal, we struggled to communicate with him and his wife. One of our other clients (G) was Senegalese and we connected them together. 'G' translated with 'SS' and us and we were better able to help. As the weeks/months have gone on, 'SS's English and circumstances have improved considerably. He came to our citizen voice group and made friends with the client that was helping him with translation (G).<br>• Advocated on many occasions with Bristol City Council regarding his rent and council tax and set up repayment plans for outstanding debts.<br>• Liaised with DWP, child benefit applications, regular assistance with 'S's U/C journal and account.<br>• We helped with his C.V. and job applications.<br>• Provided clothes and items, toys for the children and household appliances.<br>• Liaised with the embassy |
| Outcome / Impact | The family were in temporary accommodation and have now been housed in a more permanent residence and are much more settled. Entitled benefits in place. 'SS' has a new job and can now support his family without our assistance. |
| Client Comment | *"Amazing people, so helpful and make life a little bit easier with my family of 6. We are very grateful for all you've done for me and my family, with everything when we didn't know where to turn, felt welcomed and enjoyed the support from you and also coming to the group and I made a friend. Thank you thank you so very much."* |

| Beneficiary type | Single Mum – children from disadvantaged background |
|---|---|
| JG | 'JG' is a 30-year-old single mother to her 5-year-old son. She struggles with her mental and physical health and is constantly worried about money. 'JG' was working part time as a dinner lady but due to the loss of her job is struggling and has debts. |
| Reason for referral | Low income and debt |
| Referred by | Rework |
| Activities – what we did | • helped with benefit entitlements.<br>• Application to Bristol Charities for a fridge / freezer<br>• Phone calls / advocacy with BCC for Council Tax and Water debt<br>• Emotional support<br>• Food |
| Outcomes | • Benefits in place<br>• Household goods provided.<br>• Repayment debt plans set up.<br>• Volunteering (with The Matthew Tree Project) set up to help 'JG' rebuild her confidence |
| Client Comment | *"Coming to The Matthew Tree Project has really helped my mental health and anxiety issues. I have made new friends and I have started to volunteer, which gives me a lot of satisfaction and I feel I have a purpose in life. They have helped me with my debts and helped make phone calls to deal with my issues. Helped me get a new fridge freezer. Very friendly, always here to listen to everyone and they don't judge you. Very lovely people, thank you x"* |

| Beneficiary type | Disability / older person / illness |
|---|---|
| JW | 'JW' is now a 66-year-old lady and in receipt of pension, however when she came to us last year at 65 years, she had just lost her husband suddenly. 'JW's husband took care of all the household costs and 'JW' was at a loss of how to cope. Even though she had lived in her home for 30 years, due to rising costs and bedroom tax she decided she needed to downsize. 'JW' is not in good health and unable to work due to ill health, she suffers with COPD, arthritis, diabetes, and asthma. 'JW' was missing meals and not able to heat her home and had debts. |
| Reason for referral | Bereaved, cost of living |
| Referred by | Previous client (returned April 2023) |
| Activities – what we did | • Benefit claims<br>• Email and home choice accounts set up – weekly bidding.<br>• Food<br>• Emotional Support<br>• Advocacy with debt organisations<br>• Grant applications for household items<br>• Pension credit application |
| Outcomes | • Successful move to a one-bedroom bungalow<br>• Successful grants awarded from BCC, St Monica Trust and Bristol Charities for a new bed, fridge freezer, carpets, and to get gas cooker repaired.<br>• Overall, 'JW' is in a much happier place and more financial stable |
| Client Comment | *"You have helped me so much, can't thank you enough. I now have everything I need to be comfortable in my new home and am so much happier. Don't know what I'd have done without your support at a time when I was so lost and upset, your kindness and coming in for a cuppa and a friendly welcome have meant so much to me. I think you are all lovely."* |

## LOCATION(S)

### Community Support Hub, Filwood

The Rebuilding Lives Programme is delivered from the charity's ***Community Support Hub located in the very heart of the Filwood community (BS4 1JN),*** open Monday to Friday (pictured right).

In addition to providing community engagement and holistic crisis support, the programme reduces isolation by bringing people together in a safe and socially vibrant environment, to help themselves, each other, and engage positively within the wider community where they live.

Filwood, one of the country's most disadvantaged communities is in the top 1.5% of most deprived neighbourhoods in the UK, has one of the highest levels of obesity (60.1%), child poverty (25.3%), 58.3% are claiming unemployment related benefits and only 2.4% have above average mental wellbeing. Poverty results in major health and social issues that are damaging for our citizens, costly for government and create a negative cycle from generation to generation.

We receive referrals from a wide range of statutory and non-statutory organisations and accept self-referral. This often happens when an existing client or ex-client tells someone they know to be struggling of their positive experience within the programme.

### Urban Food Growing Site, Brislington

The Matthew Tree Project run an urban food growing site in Brislington, Bristol (pictured below). The food grown is added to the food stocks of the charity to be distributed to vulnerable households who are unable to afford to eat properly. Food is grown using organic principles and clients receive food growing training, positive outdoor engagement with others (feeling part of a team and social interaction), and the sense of making a positive contribution towards the work of the charity.

### Administration Centre, Bradley Stoke, South Gloucestershire

*Left: The Matthew Tree Project occupy the Ground and 2nd Floor of Beech House, Bradley Stoke.*

## ACTIVITIES

The Rebuilding Lives Programme provides a range of activities, driven by client needs as determined by them:

### One-2-One Weekly Support Package Elements:

- Diagnosis & understanding of underlying causes & barriers to progress.
- Advocacy
- Befriending
- Nutritional wellbeing (food & nutritional screening)
- Free internet access
- Free phone charging points
- Support filling out forms, understanding & replying to letters.
- Listening ear/emotional support
- Accompanied appointments, hearings, assessments.
- Volunteering opportunities (to build confidence and learn new skills)
- Activities in support of addiction recovery
- Social interaction/inclusion
- Provision of essential household items (white/brown goods) grants
- Provision of crisis grants to (a) pay off debt such as energy arrears; and (b) emergency payments to turn the gas/electric meter back on
- Christmas presents (client's children)
- Transition/exit to independence support

### Specialist Services, introduced as required include (funded separately):

- Professional Counselling
- Advice
- Financial wellbeing
- Skills training
- Securing Employment

Group Activities:

- Citizen Voice Group
- Food Growing
- Food Appeal Collections
- Community Engagement, i.e., Name the Bear, Easter Competition
- Children's Christmas Present Appeal
- Community Meal Celebrations

The Matthew Tree Project Holistic Crisis Support Hub is open Monday to Friday for clients to come depending upon their needs and circumstances. Every client is different, every client case is different and because of this a key feature of the Rebuilding Lives Programme is that it adapts to create a uniquely tailored package of end-to-end joined-up support around each vulnerable household. This means, for example, if a client needs access to the internet or to charge their phone, they can come every day to do this. However, other client needs will require expert advice, support, and interventions, such as applying for a crisis grant to clear fuel debt arrears or to turn the gas meter back on, so for this we make an appointment.

Monday to Wednesday & Friday (Community Support Hub) is when the food aid is distributed and one2one support sessions take place where next steps are agreed and required actions implemented. If someone is unable to come in person, because of sickness for example, then we provide telephone crisis support to discuss the pressing issues and next step actions.

Thursday (Community Support Hub) is when the Citizen Voice Group come together to discuss what challenges people are facing and what changes, if any, should be made to the Rebuilding Lives Programme. This is open to all clients to be part of – no-one is excluded. It is also a 'social' time where lunch is served, and people mingle. Many new friendships derive out of the time people spend together and it is due to the Citizen Voice Group that for the coming year the Rebuilding Lives Programme has been enhanced to where more time and expertise is devoted into helping people address the underlying causes of their crisis and removal of barriers to progress.

Wednesday (Food Growing Site) is the food growing site volunteering and training day.

Food Appeal Collections happen once a month in partnership with ASDA. This is where a team will ask shoppers, as they enter the store, to buy an extra item or two and pop it into our basket when they leave. This is a great source of food supplies and serves to publicly raise awareness of the issue of local poverty. Often conversations that take place during this activity can lead to new people volunteering or financially supporting the work of the charity.

Children's Christmas Present Appeal Every December the charity works in partnership with several large employers in Bristol to ensure all the children being supported by the programme receive at least one brand new gift to open on Christmas Day. We provide a list of our children to each partner employer with the

age and sex of the child. Employees who choose to support the appeal pick one child and purchase a brand-new gift for that child for £10-£15 in value. Then, one evening in December we invite all those who have contributed by purchasing a gift to join the team for music and mince pies whilst wrapping all the gifts ready to be delivered to each vulnerable household before Christmas Day. Over 250 children benefited from this activity last Christmas.

Community Meal Celebration every December the charity works in partnership with one employer in Bristol to provide a Community Meal Celebration. Last December our partner for this event was AND Digital. This is always a wonderfully joyous occasion where many isolated and lonely people come together to enjoy, what for them will be their one and only festive feast of the Christmas season.

Name the Bear Easter Competition. At various points through the year, we organise community engagement events that are fun and encourage people to come together. In previous years we have put on Spring Fayre's and November 5th firework display and BBQ's. This year we ran a 'Name the Bear' Easter Competition that was aimed at the children in the community, many of whom walk past our Community Support Hub on their way to school. The Bear was displayed centre stage in our window and the children would come in to enter the name they choose for him/her. We then put on a buffet style food event to select the winning name, lucky dip style. Other prizes were donated by local businesses so that we were able to have multiple winners. The whole event was extremely popular.

The Rebuilding Lives Programme creates a community amongst its clients; a sense of value, belonging and ownership. This reduces isolation by bringing people together in a safe and socially vibrant environment, to help themselves, each other, and engage positively within the wider community where they live.

## OUTCOMES

Our clients tell us they feel happier, calmer, manage stress better, have increased self-sufficiency, improved independence and resilience, increased aspirations, feel more confident, better able to build positive relationships. They say they engage more in the community where they live, parents say their children perform better at school, they manage money better, are better able to work as part of a team, stay in recovery, and are better able to secure and hold down a job.

The Rebuilding Lives Programme provides immediate relief, substantive change, and transformational change.

We encourage clients to set personal goals for themselves and then we provide support to enable the goals to be achieved. It is not for us to tell people what they should do or strive for, rather we work hard to empower each client to be in control of their journey through the programme and create the life they want. We know our intervention is successful by the change that occurs within each client's life. Avoiding eviction; resolving debt; getting and holding down a job; maximising benefit income; reducing household expenditure; improved and better relationships; better housing conditions; increased self-confidence and self-esteem; learning new life skills (managing money better; cooking from scratch at home; food growing; Improved English language; IT skills); eating better and more healthily; improved mental health; staying in recovery from addiction; 42% of clients with children say school performance of their children improves since being in the programme.

An independent consultant was commissioned to evaluate the impact of our 'Rebuilding Lives Support Programme' and develop a theory of change framework (ToC) so that we can better understand the link between our 'interventions and client 'outcomes' for each case. The ToC identified that the Rebuilding Lives Support Programme is meeting 6 higher level needs:

- The need to feel safe and secure
- The need to have improved health and wellbeing
- The need to have support networks and feel connected
- The need to have improved resilience
- The need to have new or improved skills
- The need to have hope and a purpose

As we work with the clients, we record any positive or negative change they tell us about and place it within the context of our **'Theory of Change & Social Impact Measurement Framework'** which underpins the 'Rebuilding Lives Support Programme'.

If a client tells us, for example, that their benefits are now in payment we would record a positive outcome for the payments and also another for the fact their financial situation has improved. By classifying these two positive changes and mapping them to the Theory of Change outcome groups we arrive at a count of positive change outcomes which measures the impact of our work with each client. So, the client's benefit payment success will count towards 'Reduced Material Deprivation' and also 'Increased feeling of being in control of money/budget' as well as some Theory of Change measures.

Some of the outcomes in the Theory of Change Framework can occur frequently, such as the client having a more positive outlook or feeling happier, others will mostly be one-time changes such as moving to better accommodation.

Over the course of the last 5 years The Matthew Tree Project has designed a bespoke online case management software system based on the Apricot platform. Impact data is being collected at every interaction the client has with the programme. The case management system enables us to understand and improve the level of support provided and report on the impact of the programme to stakeholders and policy makers.

| Reported changes (over a period of at least 6 weeks) | |
|---|---|
| Sample size (cases) | 60 |
| Feeling happier | 73.5% |
| Feeling calmer | 72.4% |
| Managing stress better | 66.3% |
| More positive about the future | 68.1% |
| More able to access specialist services | 79.9% |
| Increased self-sufficiency | 82.2% |
| Improved independence and resilience | 90.7% |
| Improved self-belief | 78.3% |
| Feel more confident | 69.8% |
| Increased aspirations | 76.2% |
| More in control of own life (choices etc.) | 47.0% |
| Developed new skills to be able to earn a living | 48.5% |
| Improved budgeting skills/making money go further | 63.9% |
| Debt has reduced | 48.0% |
| I have done skills training or other courses since coming to TMTP | 29.4% |
| Improved cooking skills | 27.1% |
| Eating better | 91.1% |
| Feeling healthier | 70.7% |
| Putting on/losing weight - whichever is healthier | 41.1% |
| Understanding and acknowledgement of root causes/issues | 61.8% |
| Less worried about being homeless | 33.0% |
| Improved mental wellbeing | 93.9% |
| Better able to cope with crisis | 99.0% |
| Improved school performance of children | 42.0% |
| Feel less isolated | 62.8% |

## RELATED PARTIES

The reason The Matthew Tree Project was established in 2010 is to:

"To relieve financial hardship amongst all peoples of all ages in the local communities in accordance with a Christian ethos whilst contributing towards the eradication of poverty in the UK, once and for all."

RISE Social Enterprise has been established in the furtherance of this objective.

The Matthew Tree Project wholly own Rise Social Enterprise Limited, a company limited by shares number 10740064. See WWW.RISESOCIALENTERPRISE.CO.UK for more information.

## AWARDS

The charity has won several awards in the last 12 months:

- Bristol Prestige Award Winner for '**Best in Charitable Community Services' 2022.**
- Innovation & Excellence Award Winner for '**Crisis Support NPO of the Year' 2023.**
- AI Non-profit Organisation Award **'Most Empowering Crisis Support Programme' 2023.**
- Corporate Live Wire **Global Award** for '**Crisis Support NPO of the Year' 2023.**

## NATIONAL RECOGNITION

**New: Approved Referrer to Children in Need Essentials Family Fund**

One of the recurring and most pressing 'needs' people have, is for a crisis grant and/or essential household items. **The Matthew Tree Project is now an approved referrer to the Children in Need Essentials Family Fund** which enables us to secure a range of essential items for households with children.

**New: Strategic Partnership with Marmalade Restaurants, the Fishponds McDonald's franchise owner**

Helping people into [good] employment has always been a key element of our work, and this year we have been successful in the **development of a key strategic partnership with large employer, McDonalds (Fishponds)** where clients looking for work, often many years unemployed, are 'given a chance' and are supported in their re-integration into the workplace by the employer and The Matthew Tree Project.

**National recognition has been achieved by way of an MBE** awarded to Mark Goodway, Founder & CEO of The Matthew Tree Project, in the Kings Birthday Honours List, June 2023 for Services to Charity and to Disadvantaged People. Mark accepted the honour on behalf of the hundreds of people who have been involved with, and have supported The Matthew Tree Project since 2010, without which none of this would have been possible.

**ITV News** Upon announcement of the honour, featuring Mark:
(https://youtu.be/XEDDQ9w9sjI?feature=shared),

**Bristol Post,** featuring Mark: (https://www.bristolpost.co.uk/news/bristol-news/marks-tireless-commitment-eradicating-poverty-8525997

## TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS

The trustees (who are also directors of The Matthew Tree Project for the purposes of company law) are responsible for preparing the Trustees' Report (incorporating the strategic report and directors' report) and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that 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 financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Trustees on .....31/10/2023.....and signed on their behalf by:

Colin Sainsbury CMC FIC – Trustee Chair
31 October 2023

# INDEPENDENT EXAMINERS REPORT

**Independent examiner's report to the trustees of The Matthew Tree Project**
I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 December 2022.

.

**Responsibilities and basis of report**
As the charity's trustees of the Company (and its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

**Independent examiner's statement**
Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of the 'Association of Accounting Technicians', which is one of the listed bodies.

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

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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

Andy Forse FMAAT
Causeway Accountancy
279 Lodge Causeway
Fishponds
Bristol BS15 3RA

Date: .....31/10/2023.....

| | NOTE | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2022 £ | Total Funds 2021 £ |
|---|---|---|---|---|---|
| **Income from:** | | | | | |
| Donations | | 34,430.23 | 186,659.40 | 221,089.63 | 444,278.94 |
| Grants receivable | | 41,620.00 | 40,000.00 | 81,620.00 | 177,360.64 |
| Charitable activities | | 0 | 0 | 0 | 0 |
| Other sources | | 5,008.14 | 0 | 5,008.14 | 4,004.50 |
| **Total income** | | **81,058.37** | **226,659.40** | **307,717.77** | **625,644.08** |
| **Expenditure on:** | | | | | |
| Raising funds | | 4,875.90 | - | 4,875.90 | 10,406.29 |
| Charitable activities | 2 | 162,476.58 | 225,011.12 | 387,487.70 | 648,922.73 |
| **Total expenditure** | | **167,352.48** | **225,011.12** | **392,363.60** | **659,329.02** |
| **Net income/(expenditure) and net movement in funds** | 3 | (86,294.11) | 1,648.28 | (84,645.83) | (33,684.94) |
| **Total funds at 1 January 2022** | 10 | 259,620.42 | 88,941.94 | 348,562.36 | 382.247.30 |
| **Total funds at 31 December 2022** | 10 | **173,326.31** | **90,590.22** | **263,916.53** | **348,562.36** |

There are no recognised gains or losses other than the results for the year as set out above.

All activities are classed as continuing.

Fund-accounting comparative transactions are shown in note 4.

| | NOTE | 2022 | 2021 |
|---|---|---|---|
| | | £ | £ |
| **Fixed assets** | | | |
| Tangible fixed assets | 6 | 26,863.52 | 34,081.96 |
| Investments | 7 | 1.00 | 1.00 |
| | | 26,864.52 | 34,082.96 |
| **Current assets** | | | |
| Debtors | 8 | 0 | 1,250.00 |
| Food stocks | | 4,623.70 | 34,642.09 |
| Rise loan account | | 245,586.76 | 221,239.04 |
| Cash at bank | | 16,108.47 | 62,030.12 |
| | | 266,318.93 | 319,161.25 |
| **Creditors: amounts falling due within one year** | 9 | - 29,266.92 | - 4,681.85 |
| **Net current assets** | | *263,916.53 | 348,562.36 |
| Restricted and unrestricted funds | | | |
| Unrestricted funds | 11 | 204,992.98 | 88,942.28 |
| Restricted funds | 11 | 58,923.55 | 259,620.08 |
| **Total funds** | | *263,916.08 | 348,562.36 |

**See page 6, OUTLOOK. Throughout 2023 the financial position of the charity has improved. At the end of July 2023, the balance sheet value has increased to £310,697.*

| | | 2022 | 2021 |
|---|---|---|---|
| **Net cash flow from operating activities** | | (45,921.65) | (87,080.88) |
| **Non-operational cash flows:** | | | |
| **Investing activities** | | | |
| Investment income | | 0 | 0 |
| Payments for tangible fixed assets | | 0 | (2,083.98) |
| **Net cash inflow/(outflow) for the year** | A | (45,921.65) | (89,164.86) |

**Cashflow Restrictions**
Charity law prohibits the use of net cash inflows on any endowed or other restricted fund to offset net cash outflows on any fund outside its own objects, except on special authority. In practice, this restriction has not had any effect on cash flows for the year.

**A Analysis of changes in cash during the year**

| | 2022 | 2021 | Change |
|---|---|---|---|
| | £ | £ | £ |
| Cash at bank and in hand | 16,108.47 | 62,030.12 | (45,921.65) |

**B Analysis of changes in net debt**

| | At 01-Jan-22 | Cash flows | Non cash flows | At 31-Dec-22 |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| Cash and cash equivalents | | | | |
| Cash | 62,030.12 | (45,921.65) | - | 16,108.47 |
| **Total** | 62,030.12 | (45,921.65) | - | 16,108.47 |

## 1 Accounting Policies

a) The financial statements have been prepared in accordance with the Charities Act 2011, the Companies Act 2006, Financial Reporting Standard FRS102, and the Charities' Statement of Recommended Practice (FRS102). Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy note(s).
The charity meets the definition of a public benefit entity under FRS102.
The trustees consider that the charity is able to continue as a going concern for at least the next twelve months. Please refer to the trustees' consideration in the Trustees' Report.
b) Income from donations is included when it is receivable, except as follows:

I. When donors specify that donations given to the charity must be used in future accounting periods, the income is deferred until those periods;
II. When donors impose conditions, which have to be fulfilled before the charity becomes entitled to use such income, the income is deferred until the pre-conditions have been met.

c) Gifts in kind includes donated services and facilities which are recognised at a reasonable estimate of their gross value to the Charity. An equivalent amount has been included as expenditure under the appropriate heading in the Statement of Financial Activities.
d) Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure includes attributable VAT, which cannot be recovered.
e) Grants payable is charged in the year when the offer is conveyed to the recipient except in those cases where the offer is conditional, such grants being recognised when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the year-end are noted as a commitment, but not accrued as expenditure.
f) Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition.
Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value, over the useful economic life of that asset as follows:

| | |
|---|---|
| Equipment | 5% per annum on a reducing balance basis |
| Office equipment, furniture and fixtures | 5% per annum on a reducing balance basis |
| Motor vehicles | 5% per annum on a reducing balance basis |

g) Cash at bank includes cash and short-term highly liquid investments with a notice of withdrawal period of three months or less.
h) Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.
i) Creditors are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.
j) Unrestricted funds can be used in accordance with the charitable objects at the discretion of the trustees.

l) Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. Expenditure which meets these criteria is charged to the fund, together with a fair allocation of management and support costs. Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

## 2 Costs of activities in furtherance of charity's objectives

| | Total Funds 2022 £ | Total Funds 2021 £ |
|---|---|---|
| **Direct costs** | | |
| Food costs | 216,677.79 | 395,076.97 |
| Premises | 1,585.13 | 539.86 |
| Salaries | 82,369.89 | 132,252.39 |
| Strategic partner grants | 0 | 3,750.00 |
| Hardship grants | 0 | 530.00 |
| | 300,632.81 | 531,069.50 |
| **Support costs** | | |
| Salaries | 67,325.82 | 72,598.41 |
| Employer's pension costs | 2,641.20 | 2,768.36 |
| Other staff costs | 370.61 | 717.35 |
| Printing and stationery | 589.42 | 9,880.04 |
| Meeting costs | 634.20 | 416.35 |
| IT costs | 1,226.46 | 6,529.91 |
| Motor and travel expenses | 6,208.15 | 6,438.03 |
| Depreciation | 7,218.44 | 10,701.12 |
| Miscellaneous expenses | 133.87 | 2,382.21 |
| **Governance costs** | | |
| Legal and professional fees | 326.72 | 3,350.28 |
| Accountancy & Independent examiner’s fee | 180.00 | 2,071.20 |
| | 86,854.89 | 117,853.26 |
| | 387,487.70 | 648,992.76 |

## 4 Fund-accounting comparative figures

| | General Funds £ | Restricted Funds £ | Total Funds 2022 £ |
|---|---|---|---|
| **Income from:** | | | |
| Donations | 34,430.23 | 186,659.40 | 221,089.63 |
| Grants receivable | 41,620.00 | 40,000.00 | 81,620.00 |
| Charitable activities | - | - | - |
| Other sources | 5,008.14 | - | 5,008.14 |
| **Total income** | 81,058.37 | 226,659.40 | 307,717.77 |
| Expenditure on: | | | |
| Raising funds | 4,875.90 | - | 4,875.90 |
| Charitable activities | 134,976.28 | 252,511.42 | 387,487.70 |
| **Total expenditure** | 139,852.18 | 252,511.42 | 392,363.60 |
| **Net income/(expenditure) and net movement in funds** | (58,793.81) | (25,852.02) | (84,645.83) |
| **Total funds at 1 January 2022** | 195,115.08 | 153,447.28 | 348,562.36 |
| **Total funds at 31 December 2022** | 136,321.27 | 127,595.26 | 263,916.53 |

## 5 Salaries

| | 2022 £ | 2021 £ |
|---|---|---|
| Salaries & National Insurance | 155,500.70 | 204,850.80 |
| Employer's pension contributions | 2,641.20 | 2,768.36 |
| | 158,141.90 | 207,619.16 |

## 6 Tangible Fixed Assets

| | Equipment | Office equipment, fixtures & fittings | Motor vehicles | Total |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| **Cost** | | | | |
| At 1 January 2022 | 69,254.86 | 24,388.09 | 13,797.49 | 107,440.43 |
| Additions | | | | |
| At 31 December 2022 | 69,254.86 | 24,388.09 | 13,797.49 | 107,440.43 |
| **Depreciation** | | | | |
| At 1 January 2022 | 43,585.34 | 18,012.69 | 11,760.44 | 73,358.12 |
| Charge for the year | 5,541.99 | 1,167.19 | 509.26 | 7,218.44 |
| At 31 December 2022 | 49,127.33 | 19,179.88 | 12,269.70 | 80,576.91 |
| **Net book value** | | | | |
| **At 31 December 2022** | **20,127.52** | **5,208.21** | **1,527.79** | **26,863.52** |
| At 31 December 2021 | 26,836.70 | 5,208.21 | 2,036.86 | 34,081.86 |

## 7 Investments

| | 2022 | 2021 |
|---|---|---|
| | £ | £ |
| 100% holding in subsidiary | 1 | 1 |

RISE Social Enterprise Ltd (company number 10740064) is a subsidiary of the charity. At the end of the year, the company owed The Matthew Tree Project £245,586.76 (2021: £221,239).

## 8 Debtors

| | 2022 | 2021 |
|---|---|---|
| | £ | £ |
| Rental deposits | 0 | 1250 |
| | 0 | 1250 |

## 9 Creditors falling due within one year

| | 2022 | 2021 |
|---|---|---|
| | £ | £ |
| Creditors | 1.00 | 1.00 |
| PAYE and NI, salaries | 29,265.92 | 4,680.85 |
| | 29,266.92 | 4,681.85 |

## 10 Movement in funds

| | At 1 Janaury 2022 | Income | Expenditure | Transfers | At 31 December 2022 |
|---|---|---|---|---|---|
| | £ | £ | £ | £ | £ |
| **Restricted funds** | | | | | |
| Key personnel salaries | 0.30 | - | 0.30 | - | - |
| Food distribution operations | 15,000.00 | - | 15,000.00 | - | - |
| Rebuilding Lives | - | 40,000.00 | 8,333.33 | - | 31,666.67 |
| RISE Social Enterprise | - | - | - | - | - |
| Data Analysis Officer | 12,500.00 | - | 12,500.00 | - | - |
| Designated funds; Food stock funds | 34,642.09 | 186,659.40 | 216,677.79 | - | 4,623.70 |
| | 62,142.39 | 226,659.40 | 252,511.42 | - | 36,290.37 |
| Unrestricted general funds | 286,419.94 | 81,058.37 | 139,852.18 | - | 227,626.13 |
| Total funds | 348,562.33 | 307,717.77 | 392,363.60 | - | 263,916.50 |

Unrestricted funds are available to be used at the discretion of the trustees in line with the charity's purposes.

Designated funds - The Food Stock fund represents gifts of food received during the year and food distributed to those in need. The balance at the end of the year is the value of food stocks held by the charity. Restricted funds - The Key personnel salaries fund includes grants received to fund the Chief Executive Officer's salary. The Food Distribution Operations fund includes grants received to fund the supervisor of this work. The Rebuilding Lives fund includes grants received towards running the charity's Rebuilding Lives Crisis Support Programme. Rise Social Enterprise fund - funds were received for setup costs and for a kitchen. Money Smart Work Wise - funds were received to enable work on this project Mobile Foodstore funds were received to help with the purchase of a lorry to set up a mobile store. The Data Analysis fund enables the charity to see where our work is needed most and evaluate the results of its operations.

## 11 Analysis of Net Assets Between Funds

| | Tangible Fixed Assets | Other Net Assets | Total Funds 2022 |
|---|---|---|---|
| | £ | £ | £ |
| Restricted funds | | 36,290.37 | 36,290.37 |
| Unrestricted funds | 26,864.52 | 200,761.64 | 227,626.16 |
| | 26,864.52 | 237,052.01 | 263,916.53 |

| Prior Year | Tangible Fixed Assets | Other Net Assets | Total Funds 2021 |
|---|---|---|---|
| | £ | £ | £ |
| Restricted funds | | 88,942.25 | 88,942.25 |
| Unrestricted funds | 34,082.96 | 225,537.12 | 259,620.08 |
| | 34,082.96 | 314,479.37 | 348,562.33 |

## 12 Related parties

There were no related party transactions during this, or the prior year, other than those noted elsewhere in the accounts. No trustees received or waived expense payments during either the current, or previous year.

**THE MATTHEW TREE PROJECT**

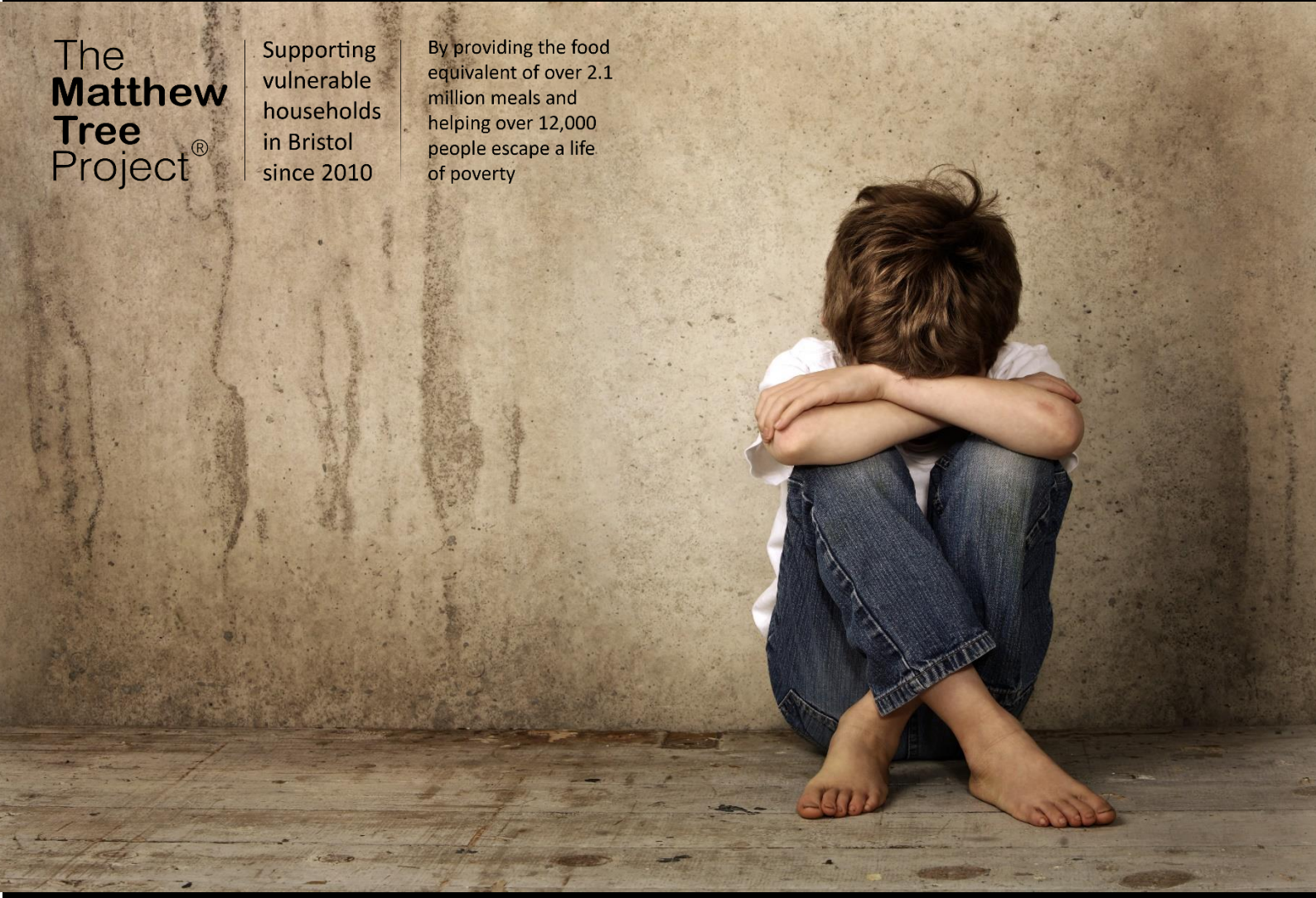
England & Wales - Charity number 1146401

# Accounts

The Matthew Tree Project®

Supporting vulnerable households in Bristol since 2010

By providing the food equivalent of over 2.1 million meals and helping over 12,000 people escape a life of poverty



# FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2021

Registered charity number: 1146401

Company number: 07324296

## OFFICERS AND PROFESSIONAL ADVISORS

TRUSTEES who have served during the year and up until the date of signing the report are:
Nigel Goodway
Roger Wooldridge
Jonathan Evans

TRUSTEES who were either appointed or resigned during the period and prior to signing these accounts:
Lorraine Patch – resigned 29 May 2021
Colin Sainsbury CMC FIC – appointed 12 August 2021

### INDEPENDENT MANAGEMENT ADVISOR

Anstey Barton Consulting
Huntsham
Tiverton
EX16 7NG

### INDEPENDENT HR ADVISOR

BrightHR
Peninsula Consulting
Victoria Place
Manchester M4 4FB

### FINANCIAL OFFICER

Sue McQuaid
Libra Accounting Services Ltd
54 Petherton Gardens
Hengrove, Bristol BS14 9BS

### BANKERS

HSBC Bank plc
431 Oxford Street
London
W1C 2DA

### INSURERS

Zurich Insurance plc
The Zurich Centre
3000 Parkway
Whiteley, Fareham PO15 7JZ

### PRINCIPAL OFFICE OF THE CHARITY

10 Filwood Broadway
Knowle
Bristol
BS4 1JL

### REGISTERED OFFICE OF THE CHARITY

3rd Floor
207 Regent Street
London
W1B 3HH

### INDEPENDENT ACCOUNTS EXAMINER

Andy Forse FMAAT
Causeway Accountancy
279 Lodge Causeway
Bristol BS16 3RA

### IMPACT MONITORING ADVISORS

Clarity CIC
The Old Bakery, Old Road
Harbertonford
Totnes TQ9 7TA

apricot™ CASE MANAGEMENT SOFTWARE

Fully integrated bespoke case management and impact monitoring system designed on the APRICOT® software platform and underpinned by The Matthew Tree Project 'Theory of Change Framework'.

## REPORT OF THE TRUSTEES

The Board of Trustees present their annual report and the independently examined financial statements for the year ended 31 December 2021. These are prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Trust Deed, 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) and Financial Reporting Standard 102 and the Companies Act 2006.

## STRUCTURE, GOVERNANCE AND MANAGEMENT

The Mathew Tree Project was established in July 2010 and is a registered charity, number 1146401. The charitable company is registered as a company limited by guarantee, as defined by the Companies Act 2006. The governing document is its Memorandum and Articles of Association, and it is a registered company (number 7324296).

The Charitable Company has no share capital, but under the terms of the Memorandum of Association, every member is liable to contribute a sum not exceeding £10 in the event of the Charitable Company being wound up.

The principal objects of the Charitable Company are:

"To relieve financial hardship amongst all peoples of all ages in the local communities in accordance with a Christian ethos."

## RISK MANAGEMENT

The Trustees confirm that they regularly review the significant risks facing the Trust and have systems and procedures in place to mitigate those risks. The risk policy has adopted a risk mapping methodology that is applied to each identified risk, assessing the likelihood of it occurring and the severity of the impact of occurrence on the Trust.

## OBJECTIVES AND ACTIVITIES FOR THE PUBLIC BENEFIT

The Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission when exercising their powers and duties.

## RESULTS FOR THE YEAR

The charity received income for the year of £625,644, (2020: £989,302), including £389,117 (2020: £449,225) of food gifts for distribution to those in need. Expenditure for the year was £659,329 (2020: £845,530).

## RESERVES POLICY

The trustees aim to hold no more than £100,000 of free reserves. Any funds over this level are reinvested in the development of client services. At the end of the year, free reserves were £34,530, and at the end of 2020 free reserves were £124,268.

## GOING CONCERN

After making enquiries, the Trustees have a reasonable expectation that the Trust has adequate resources to continue its objectives and activities for the public benefit for the foreseeable future. Accordingly, they continue to adopt the going concern basis in preparing the annual report and financial statements.

Further details regarding the adoption of the going concern basis are in note 1 'Accounting Policies' in the financial statements.

**Covid-19 Pandemic**

Covid-19 was first reported during the previous reporting period. The World Health Organization declared the outbreak a Public Health Emergency of International Concern on 30 January 2020, and a pandemic on 11 March 2020.

As a result, 2021 has been a brutal year for so many people because of the worldwide pandemic which has claimed the lives of circa 208,000 people in the UK (people who died within 28 days of testing positive for Covid-19) as of 7 October 2022.

The crisis support services provided by The Matthew Tree Project has meant that the charity is regarded as a provider of key frontline emergency support services. Covid-19 has sharply increased demand on the charity: open case load rose from 320 people to 671 people between March 2020 and February 2021; and has significantly increased operational costs.

Covid-19 has placed un-imaginable pressure on the resources and processes of the charity – at entry point by way of food supplies and further down the line in addressing the underlying causes of the crisis. Due to Covid-19, the way services are delivered has been completely repurposed:

**Support Centres / Community Hubs Temporarily Closed**
All five 'Rebuilding Lives Community Hubs' closed for the safety of the clients, many of whom are vulnerable, and our volunteers and staff.

**City-wide Home Delivery Foodservice Launched**
Weekly home delivery foodservice introduced. By the end of December 2021, The Matthew Tree Project were distributing the food equivalent of circa. 9000 meals per week – up from 6000 (Feb, 2020).

**New Crisis Support Phone Line Launched**
A (lifeline) weekly crisis support phone service has been introduced which has enabled the programme to continue to help people address their crisis situation and rebuild a better future.

## RELATED PARTIES

The Matthew Tree Project wholly own Rise Social Enterprise Limited, company limited by shares number 10740064.

## AWARDS

The Matthew Tree Project were awarded the following accolades:

Winner of Bristol Prestige Award for 'Best in Charitable Community Services' in 2020, 2021, and 2022.

## TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS

The trustees (who are also directors of The Matthew Tree Project for the purposes of company law) are responsible for preparing the Trustees' Report (incorporating the strategic report and directors' report) and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that 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 financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Trustees on ……31/10/2022……and signed on their behalf by:

Colin Sainsbury CMC FIC – Trustee Chair
31 October 2022

# INDEPENDENT EXAMINERS REPORT

**Independent examiner's report to the trustees of The Matthew Tree Project**
I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 December 2021.

.

**Responsibilities and basis of report**
As the charity's trustees of the Company (and its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act.

**Independent examiner's statement**
Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of the 'Association of Accounting Technicians', which is one of the listed bodies.

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

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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

Andy Forse FMAAT
Causeway Accountancy
279 Lodge Causeway
Fishponds
Bristol BS15 3RA

Date: 31/10/22

**THE MATTHEW TREE PROJECT: FINANCIAL ACCOUNTS 2021**

| | NOTE | Unrestricted Funds £ | Restricted Funds £ | Total Funds 2021 £ | Total Funds 2020 £ |
|---|---|---|---|---|---|
| **Income from:** | | | | | |
| Donations | | 55,161.30 | 389,117.64 | 444,278.94 | 503,976.00 |
| Grants receivable | | 70,770.14 | 106,590.50 | 177,360.64 | 481,165.00 |
| Charitable activities | | - | - | - | - |
| Other sources | | 4,004.50 | - | 4,004.50 | 4,161.00 |
| **Total income** | | **129,935.94** | **495,708.14** | **625,644.08** | **989,302.00** |
| **Expenditure on:** | | | | | |
| Raising funds | | 10,406.29 | - | 10,406.29 | 18,208.00 |
| Charitable activities | 2 | 48,682.53 | 600,240.20 | 648,922.73 | 827,322.00 |
| **Total expenditure** | | **59,088.82** | **600,240.20** | **659,329.02** | **845,530.00** |
| **Net income/(expenditure) and net movement in funds** | 3 | 70,847.12 | -104,532.06 | -33,684.94 | 143,772.00 |
| **Total funds at 1 January 2021** | 10 | 188,773.00 | 193,474.00 | 382,247.00 | 238,475.00 |
| **Total funds at 31 December 2021** | 10 | **259,620.12** | **88,941.94** | **348,562.06** | **382,247.00** |

There are no recognised gains or losses other than the results for the year as set out above.

All activities are classed as continuing.

Fund-accounting comparative transactions are shown in note 4.

| | NOTE | 2021 | 2020 |
|---|---|---|---|
| | | £ | £ |
| **Fixed assets** | | | |
| Tangible fixed assets | 6 | 34,081.96 | 42,744.00 |
| Investments | 7 | 1.00 | 1.00 |
| | | 34,082.96 | 42,745.00 |
| **Current assets** | | | |
| Debtors | 8 | 1,250.00 | 1,250.00 |
| Food stocks | | 34,642.09 | 32,918.00 |
| Rise loan account | | 221,239.04 | 163,886.00 |
| Cash at bank | | 62,030.12 | 149,111.00 |
| | | 319,161.25 | 347,165.00 |
| **Creditors: amounts falling due within one year** | | - | - |
| | 9 | 4,681.85 | 7,663.00 |
| **Net current assets** | | 348,562.36 | 382,247.00 |
| Restricted and unrestricted funds | | | |
| Unrestricted funds | 11 | 88,941.95 | 188,773.00 |
| Restricted funds | 11 | 259,620.08 | 193,474.00 |
| **Total funds** | | 348,562.03 | 382,247.00 |

| | | | |
|---|---|---|---|
| **Net cash flow from operating activities** | | -87,080.88 | 112,127.00 |
| **Non-operational cash flows:** | | | |
| **Investing activities** | | | |
| Investment income | | - | 2.00 |
| Payments for tangible fixed assets | | -2,083.98 | -4,873.00 |
| **Net cash inflow/(outflow) for the year** | A | -89,164.86 | 107,256.00 |

**Cashflow Restrictions**
Charity law prohibits the use of net cash inflows on any endowed or other restricted fund to offset net cash outflows on any fund outside its own objects, except on special authority. In practice, this restriction has not had any effect on cash flows for the year.

**A Analysis of changes in cash during the year**

| | 2021 | 2020 | Change |
|---|---|---|---|
| | £ | £ | £ |
| Cash at bank and in hand | 62,030.12 | 149,111.00 | -87,080.88 |

| | 2020 | 2019 | Change |
|---|---|---|---|
| | £ | £ | £ |
| Cash at bank and in hand | 148,111.00 | 41,855.00 | 107,256.00 |

**B Analysis of changes in net debt**

| | At 01-Jan-21 | Cash flows | Non cash flows | At 31-Dec-21 |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| Cash and cash equivalents | | | | |
| Cash | 149,111.00 | -87,080.88 | - | 62,030.12 |
| **Total** | 149,111.00 | -87,080.88 | - | 62,030.12 |

| | At 43,831.00 | Cash flows | Non cash flows | At 44,196.00 |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| Cash and cash equivalents | | | | |
| Cash | 41,855.00 | 107,256.00 | - | 149,111.00 |
| **Total** | 41,855.00 | 107,256.00 | - | 149,111.00 |

## 1 Accounting Policies

a) The financial statements have been prepared in accordance with the Charities Act 2011, the Companies Act 2006, Financial Reporting Standard FRS102, and the Charities' Statement of Recommended Practice (FRS102). Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy note(s).
The charity meets the definition of a public benefit entity under FRS102.
The trustees consider that the charity is able to continue as a going concern for at least the next twelve months. Please refer to the trustees' consideration in the Trustees' Report.
b) Income from donations is included when it is receivable, except as follows:

I. When donors specify that donations given to the charity must be used in future accounting periods, the income is deferred until those periods;
II. When donors impose conditions, which have to be fulfilled before the charity becomes entitled to use such income, the income is deferred until the pre-conditions have been met.

c) Gifts in kind includes donated services and facilities which are recognised at a reasonable estimate of their gross value to the Charity. An equivalent amount has been included as expenditure under the appropriate heading in the Statement of Financial Activities.
d) Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure includes attributable VAT, which cannot be recovered.
e) Grants payable is charged in the year when the offer is conveyed to the recipient except in those cases where the offer is conditional, such grants being recognised when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the year-end are noted as a commitment, but not accrued as expenditure.
f) Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition.
Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value, over the useful economic life of that asset as follows:

| | |
|---|---|
| Equipment | 5% per annum on a reducing balance basis |
| Office equipment, furniture and fixtures | 5% per annum on a reducing balance basis |
| Motor vehicles | 5% per annum on a reducing balance basis |

g) Cash at bank includes cash and short-term highly liquid investments with a notice of withdrawal period of three months or less.
h) Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.
i) Creditors are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.
j) Unrestricted funds can be used in accordance with the charitable objects at the discretion of the trustees.

l) Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. Expenditure which meets these criteria is charged to the fund, together with a fair allocation of management and support costs. Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

## 2 Costs of activities in furtherance of charity's objectives

| | Total Funds 2021 £ | Total Funds 2020 £ |
|---|---|---|
| **Direct costs** | | |
| Food costs | 395,076.97 | 551,843.00 |
| Premises | 539.86 | 7,925.00 |
| Salaries | 132,252.39 | 111,792.00 |
| Strategic partner grants | 3,750.00 | 30,000.00 |
| Hardship grants | 530.00 | 250.00 |
| | 531,069.50 | 701,810.00 |
| **Support costs** | | |
| Salaries | 72,598.41 | 83,259.00 |
| Employer's pension costs | 2,768.36 | 2,565.00 |
| Other staff costs | 717.35 | 581.00 |
| Printing and stationery | 9,880.04 | 9,821.00 |
| Meeting costs | 416.35 | 565.00 |
| IT costs | 6,529.91 | 7,573.00 |
| Evaluation and consultancy costs | | |
| Motor and travel expenses | 6,438.03 | 5,296.00 |
| Insurance | | |
| Depreciation | 10,701.12 | 6,630.00 |
| Miscellaneous expenses | 2,382.21 | 5,519.00 |
| **Governance costs** | | |
| Legal and professional fees | 3,350.28 | 1,664.00 |
| Independent examiner's fee | - | - |
| Accountancy | 2,071.20 | 2,039.00 |
| | 117,853.26 | 125,512.00 |
| | 648,922.76 | 827,322.00 |

## 4 Fund-accounting comparative figures

| | General Funds £ | Restricted Funds £ | Total Funds 2021 £ |
|---|---|---|---|
| **Income from:** | | | |
| Donations | 55,157.80 | 389,117.64 | 444,275.44 |
| Grants receivable | 70,774.14 | 106,590.50 | 177,364.64 |
| Charitable activities | - | - | - |
| Other sources | 4,004.00 | - | 4,004.00 |
| **Total income** | 129,935.94 | 495,708.14 | 625,644.08 |
| Expenditure on: | | | |
| Raising funds | 10,406.00 | - | 10,406.00 |
| Charitable activities | 48,682.86 | 600,240.19 | 648,923.05 |
| **Total expenditure** | 59,088.86 | 600,240.19 | 659,329.05 |
| **Net income/(expenditure) and net movement in funds** | 70,847.08 | -<br>104,532.05 | -<br>33,684.97 |
| **Total funds at 1 January 2021** | 124,268.00 | 257,979.33 | 382,247.33 |
| **Total funds at 31 December 2021** | 195,115.08 | 153,447.28 | 348,562.36 |

## 5 Salaries

| | 2021 £ | 2020 £ |
|---|---|---|
| Salaries | 190,531.85 | 181,004.00 |
| National Insurance | 14,318.95 | 14,047.00 |
| Employer's pension contributions | 2,768.36 | 2,564.00 |
| | 207,619.16 | 197,615.00 |

## 6 Tangible Fixed Assets

| | Equipment | Office equipment, fixtures & fittings | Motor vehicles | Total |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| **Cost** | | | | |
| At 1 January 2021 | 65,753.00 | 26,351.00 | 13,297.00 | 105,401.00 |
| Additions | | 1,538.98 | 500.00 | 2,038.98 |
| At 31 December 2021 | 65,753.00 | 27,889.98 | 13,797.00 | 107,439.98 |
| **Depreciation** | | | | |
| At 1 January 2021 | 36,863.00 | 14,720.00 | 11,074.00 | 62,657.00 |
| Charge for the year | 8,278.91 | 1,736.07 | 686.14 | 10,701.12 |
| At 31 December 2021 | 45,141.91 | 16,456.07 | 11,760.14 | 73,358.12 |
| **Net book value** | | | | |
| **At 31 December 2021** | **20,611.09** | **11,433.91** | **2,036.86** | **34,081.86** |
| At 31 December 2020 | 28,890.00 | 11,631.00 | 2,223.00 | 42,744.00 |

## 7 Investments

| | 2021 | 2020 |
|---|---|---|
| | £ | £ |
| 100% holding in subsidiary | 1 | 1 |

RISE Social Enterprise Ltd (company number 10740064) is a subsidiary of the charity. At the end of the year, the company owed The Matthew Tree Project £221,239 (2020: £163,886) for equipment and other services.

## 8 Debtors

| | 2021 | 2020 |
|---|---|---|
| | £ | £ |
| Rental deposits | 1250 | 1250 |
| | 1250 | 1250 |

## 9 Creditors falling due within one year

| | 2021 | 2020 |
|---|---|---|
| | £ | £ |
| Creditors | 1.00 | 982.00 |
| PAYE and NI, salaries | 4,680.85 | 6,681.00 |
| | 4,681.85 | 7,663.00 |

## 10 Movement in funds

| | At 1 Janaury 2021 | Income | Expenditure | Transfers | At 31 December 2021 |
|---|---|---|---|---|---|
| | £ | £ | £ | £ | £ |
| **Restricted funds** | | | | | |
| Key personnel salaries | 43,934.30 | - | 43,934.00 | - | 0.30 |
| Food distribution operations | 41,975.07 | 30,000.00 | 56,975.07 | - | 15,000.00 |
| Rebuilding Lives | 15,347.00 | 51,590.50 | 66,937.50 | | - |
| RISE Social Enterprise | 20,000.00 | - | 20,000.00 | - | - |
| Data Analysis Officer | 12,500.00 | 25,000.00 | 25,000.00 | - | 12,500.00 |
| Designated funds; Food stock funds | 59,717.93 | 389,117.64 | 387,393.62 | | 61,441.95 |
| | 193,474.30 | 495,708.14 | 600,240.19 | - | 88,942.25 |
| Unrestricted general funds | 188,773.00 | 129,935.94 | 59,088.86 | - | 259,620.08 |
| Total funds | 382,247.30 | 625,644.08 | 659,329.05 | - | 348,562.33 |

**Movement in funds - prior year**

| | At 1 Janaury 2020 | Income | Expenditure | Transfers | At 31 December 2020 |
|---|---|---|---|---|---|
| | £ | £ | £ | £ | £ |
| **Restricted funds** | | | | | |
| Key personnel salaries | 34,967.00 | 53,800.00 | -44,833.00 | - | 43,934.00 |
| Food distribution operations | 61,675.00 | 30,000.00 | -15,000.00 | - | 76,675.00 |
| Rebuilding Lives | 30,347.00 | 82,017.00 | -97,017.00 | - | 15,347.00 |
| RISE Social Enterprise | 5,000.00 | 20,463.00 | -463.00 | - | 25,000.00 |
| Money Smart Work Wise | 5,000.00 | - | - | - | 5,000.00 |
| Mobile Foodstore | 15,018.00 | - | - | - | 15,018.00 |
| Data Analysis Officer | 12,500.00 | - | - | - | 12,500.00 |
| Food for clients during Covid | - | 67,499.00 | -67,499.00 | - | |
| | 164,507.00 | 253,779.00 | -224,812.00 | - | 193,474.00 |
| Unrestricted general funds | 9,463.00 | 735,523.00 | -620,718.00 | - | 124,268.00 |
| Designated funds; Food stock funds | 64,505.00 | - | - | - | 64,505.00 |
| | 238,475.00 | 989,302.00 | -845,530.00 | - | 382,247.00 |

Unrestricted funds are available to be used at the discretion of the trustees in line with the charity's purposes.

Designated funds - The Food Stock fund represents gifts of food received during the year and food distributed to those in need. The balance at the end of the year is the value of food stocks held by the charity.
Restricted funds - The Key personnel salaries fund includes grants received to fund the Chief Executive Officer's salary. The Food Distribution Operations fund includes grants received to fund the supervisor of this work. The Rebuilding Lives fund includes grants received towards running the charity's Rebuilding Lives Crisis Support Programme. Rise Social Enterprise fund - funds were received for setup costs and for a kitchen. Money Smart Work Wise - funds were received to enable work on this project Mobile Foodstore funds were received to help with the purchase of a lorry to set up a mobile store. The Data Analysis fund enables the charity to see where our work is needed most and evaluate the results of its operations.

## 11 Analysis of Net Assets Between Funds

| | Tangible Fixed Assets | Other Net Assets | Total Funds 2021 |
|---|---|---|---|
| | £ | £ | £ |
| Restricted funds | | 88,942.25 | 88,942.25 |
| Unrestricted funds | 34,082.96 | 225,537.12 | 259,620.08 |
| | 34,082.96 | 314,479.37 | 348,562.33 |

| Prior Year | Tangible Fixed Assets | Other Net Assets | Total Funds 2020 |
|---|---|---|---|
| | £ | £ | £ |
| Restricted funds | | 193,474.00 | 193,474.00 |
| Unrestricted funds | 42,745.00 | 146,028.00 | 188,773.00 |
| | 42,745.00 | 339,502.00 | 382,247.00 |

## 12 Related parties

There were no related party transactions during this, or the prior year, other than those noted elsewhere in the accounts. No trustees received or waived expense payments during either the current, or previous year.

**THE MATTHEW TREE PROJECT**

England & Wales - Charity number 1146401

# Accounts

The **Matthew Tree** Project®

“The UK is one of the richest countries on the planet. We have more wealth; more resources; more knowledge; more understanding; than at any time in history. Yet still too many children grow up familiar with hunger, a cold home and exclusion from the norm of their peers. We are giving children a troubled start to life and wonder why we end up with troubled communities that cost us a fortune in social and health care public services. This is false economy on a massive scale. We have the means and the wherewithal to eradicate poverty in the UK once and for all. Therefore, we have a moral obligation to do so.”

MARK GOODWAY - FOUNDER
THE MATTHEW TREE PROJECT

# 2020 ANNUAL REPORT

The Matthew Tree Project
3rd Floor
Temple Way
Bristol BS2 0BY

WWW.THEMATTHEWTREEPROJECT.ORG
Registered charity no. 1146401

# Contents


Introduction ..... 4

Summary ..... 8

Recommendations ..... 12

Client Voice: Co-production ..... 17

Rebuilding Lives Programme ..... 18

- The Client Journey ..... 19
- Full 'wrap-around' Joined-up & Individually Tailored Support Programme ..... 20
- Client Goal Setting & Progression ..... 21
- It can happen to anyone ..... 22
- Improving Health and Wellbeing ..... 23
- The Power of Volunteering ..... 24
- Client Case Study ..... 26
- Poverty Drivers ..... 28

Collaborative Partnerships ..... 29

Systemic Change ..... 30

Theory of Change ..... 31

- Case Management & Reporting ..... 31

Christmas Gifts for our Children ..... 32

RISE Social Enterprise ..... 33

- Future Sustainable Food System ..... 33
- City-wide Food Collection & Distribution ..... 34
- Urban Food Growing ..... 37
- Food Processing Kitchen ..... 38
- Food Shoppé and Café ..... 39

10 years of rebuilding ..... 40

Client Voice ..... 41

Rebuilding Lives 2020 Factsheet ..... 43

Financial Statements for the year ended 31 December 2020 ..... 46




© The Matthew Tree Project 2021

# Introduction

It is a great privilege to be able to help people in the way we do. We believe everyone is remarkable and capable of achieving great things. 'Rebuilding Lives' - our innovative social change model is built on the fundamental belief that people are our nation's greatest asset and every individual has something to offer and a life's purpose. Sometimes, challenging circumstance - life events, ill health, lack of opportunity and a wide range of other individual and/or societal issues - intervene and leave people in desolate and desperate situations.

The objective of the 'Rebuilding Lives Support Programme' is to stabilise the crisis ***and*** address the underlying causes of the crisis - empowering people to rebuild a happier, healthier, better future.

2020 has been a brutal year for so many people because of the worldwide pandemic which has claimed the lives of 122,849 people in the UK (people who died within 28 days of testing positive for Covid-19) as of 28 February 2021.

Covid-19 has sharply increased demand: (+108% since March 2020); and has significantly increased operational costs. It has also placed un-imaginable pressure on the resources and processes of the charity – at entry point by way of food supplies and further down the line in addressing the underlying causes of the crisis. Due to Covid-19, the way services are delivered has been completely repurposed:

## Support Centres / Community Hubs Temporarily Closed

All five 'Rebuilding Lives Support Centres / Community Hubs' closed for the safety of the clients, many of whom are vulnerable; and our volunteers and staff.

## City-wide Home Delivery Foodservice Launched

Weekly home delivery foodservice introduced. By the end of December, The Matthew Tree Project were distributing the food equivalent of circa. 9000 meals per week – up from 6000 (Feb, 2020).

## New Crisis Support Phone Line Launched

A (lifeline) weekly crisis support phone service has been introduced which has enabled the programme to continue to help people address their crisis situation and rebuild a better future.

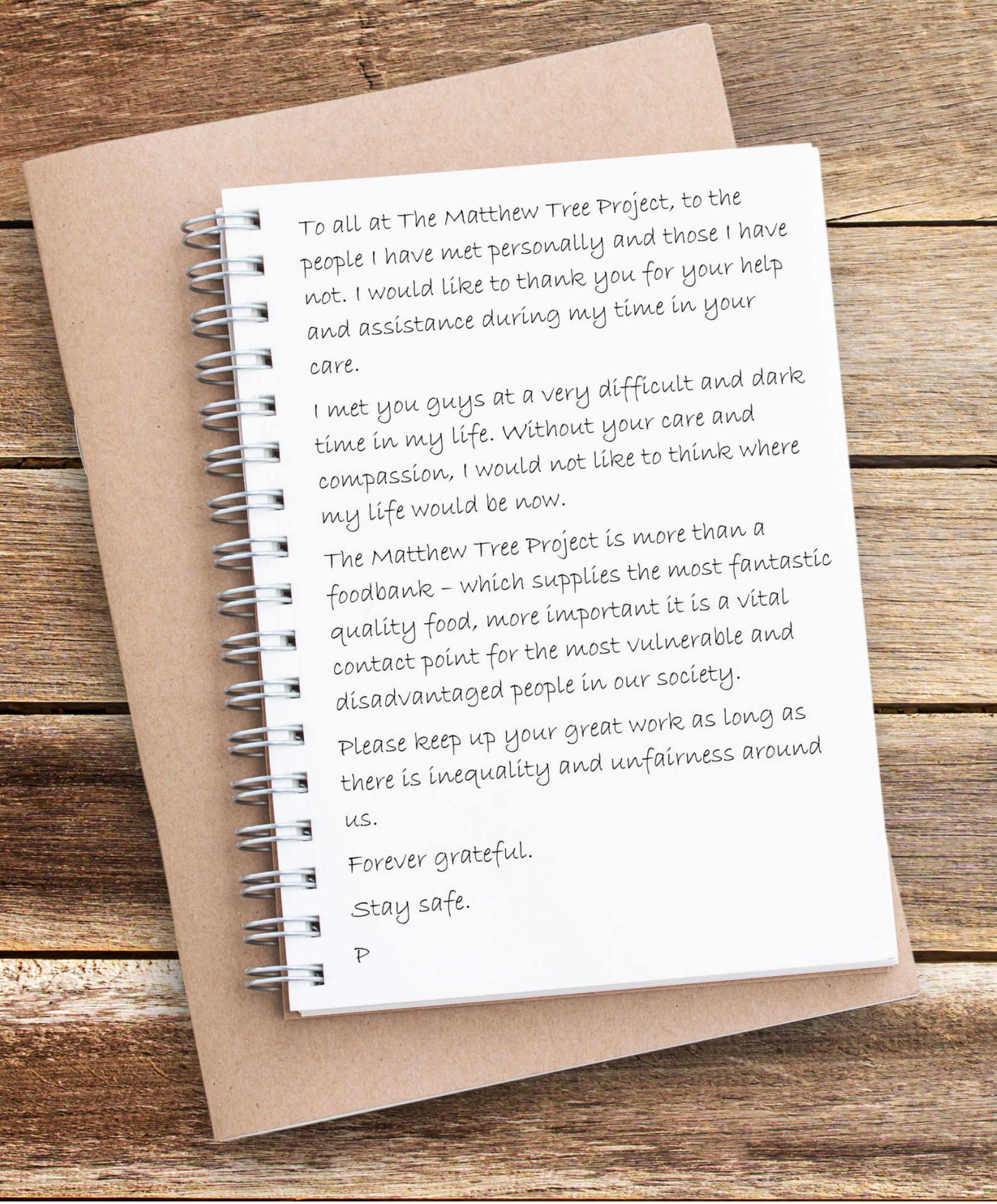
Whilst it has been the most challenging of years, it has also been one of great achievements for The Matthew Tree Project.

On 23 July the charity celebrated its 10th birthday and won the Bristol Prestiege Award for best in charitable community services 2020.

© The Matthew Tree Project 2021

A common thread running through all client cases is an almost unbearable sense of anxiety and fear. Fear of the unknown. Fear of the unthinkable. A sense of hopelessness. Feeling alone. Not knowing what to do. Not knowing who to trust.

We refer to the time a client spends with us as their journey because we encourage clients to plot a pathway out of their initial situation. The client manages their own journey, including the decision that they no longer need our support. The journey metaphor is a useful way to frame their experience as a process they themselves are making, rather than something they are obliged to do by others.



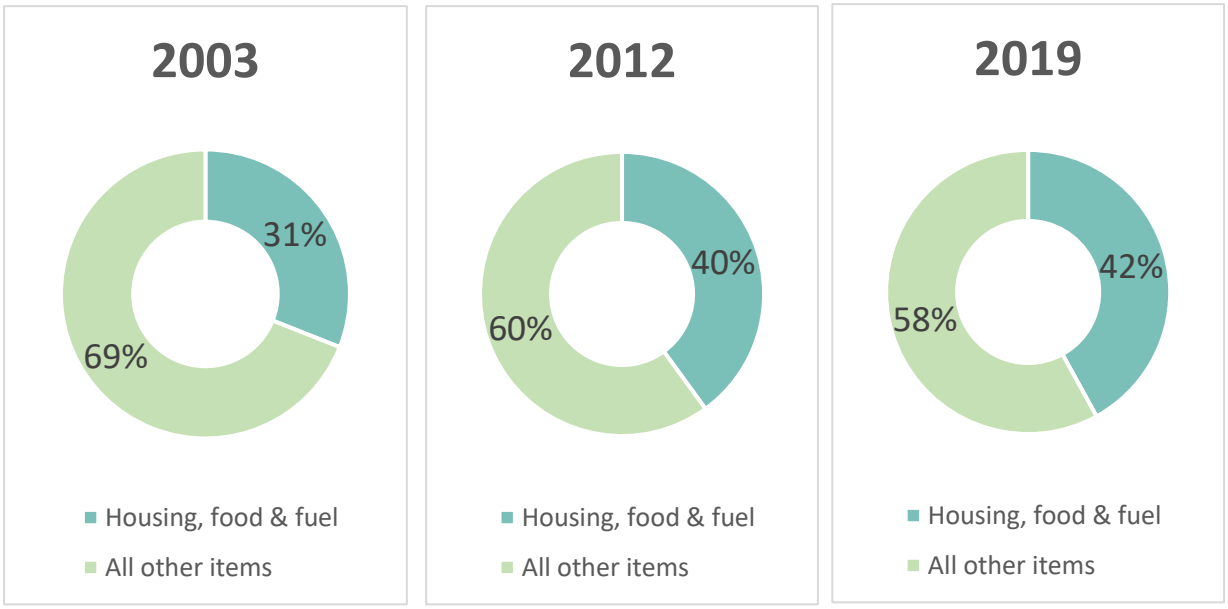

A hand written letter from a client, whose case had recently closed, was received by royal mail into The Matthew Tree Project head office on 4 January 2021. It read as above. The client signed his name in full. This has been removed for confidentiality purposes.



© The Matthew Tree Project 2021

# Summary

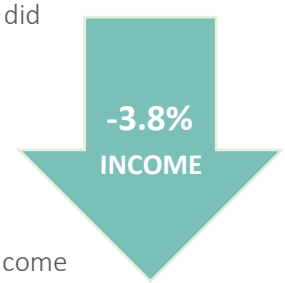
**Higher Living Costs**: combined proportion of household income devoted to housing, food and fuel costs by households in the bottom income decile:




*NB: Spending on food, housing and fuel make up 42% of total expenditure for households at the bottom decile of income distribution, compared with 26% for those in the richest 10%.* ONS statistical bulletin, January 2021.

## Falling Incomes

Whilst housing, food and fuel costs have increased significantly for the poorest households, growth in income of the poorest fifth of people did not keep pace with inflation, which led to the median income of the poorest fifth falling by an average of 3.8% per year between FYE 2017 and FYE 2019. Meanwhile, median income of the richest fifth continued to grow steadily over the same period, meaning that some measures of income inequality have increased.




## Widening Inequality Gap

During the 10-year period leading up to FYE 2020 (April 2019 – March 2020), income inequality increased by an average of 0.2% per year to 36.3%, as measured by the Gini coefficient.

## Covid-19

Throughout 2020, households' finances have been affected because of restrictions and subsequent financial support measures put in place because of Covid-19. The labour market shocks associated with the Covid-19 pandemic have been felt more by young people and the lowest paid; people aged under 30 years and those with household incomes under £10,000 were around 35% and 60%, respectively, more likely to be furloughed than the general population. Of those who have not been able to work, over half (52%) of people in the top income quintile continued to be paid in full, while this was



© The Matthew Tree Project 2021

the case for only 28% of those in the lowest income quintile.

Impacts to household spending have been felt differently across groups, with parents less able to afford either a holiday or an unexpected but necessary expense than non-parents; they were also roughly 50% more likely to have difficulty meeting their usual expenses. Throughout the pandemic, employed parents were almost twice as likely to report a reduction in income than the general population.

## Growing Debt

By December 2020, nearly 9 million people had to borrow more money because of the Covid-19 pandemic; the proportion borrowing £1,000 or more also increased from 35% to 45% since June 2020.

## Fewer Jobs

By January 2021 the UK economy had shrunk by 12% since the pandemic started and is forecast to contract still further throughout the remainder of 2021. Since February 2020; 828,000 fewer people were in payrolled employment and the loss of a job is disproportionately higher amongst the lowest paid.

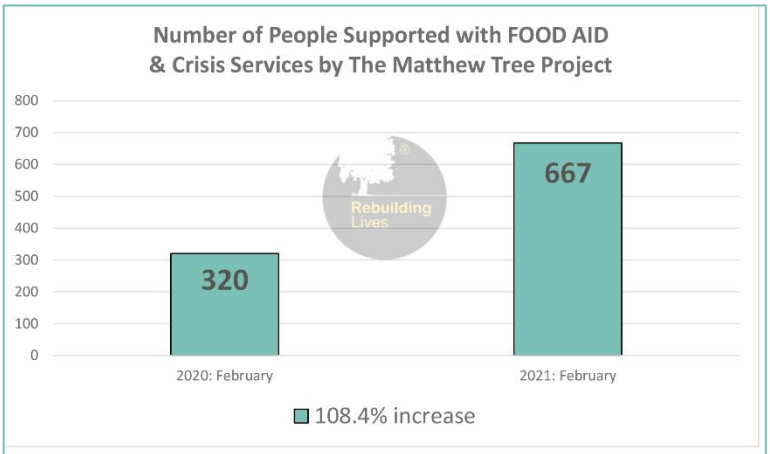
## New Working Patterns Disadvantage Low Paid

Those in higher-income groups reported that they were more likely to be able to work from home. 55.1% of people with income over £20,000 are able to work from home compared with 19.1% of people with income less than £20,000.

## Rapid Rise in NEED

Since February 2020 The Matthew Tree Project's 'Rebuilding Lives Crisis Support Programme' which always starts with a city-wide home delivery foodservice, has seen an unprecedented 108% increase in demand. By the end of 2020 the project was distributing the food equivalent of over **9,000** meals each week – making the charity one of the largest, if not the largest, provider of food aid across the Bristol region that works directly with those in need.

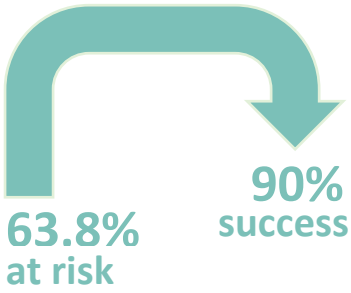
The programme delivered **4584** individual one-2-one crisis support sessions. An increase of 60.8%.



© The Matthew Tree Project 2021

## Risk of Homelessness

The Rebuilding Lives Support programme is primarily designed to intervene early and prevent people at risk of losing their homes from becoming homeless.




At the point of referral, 63.8% of people are at risk of becoming homeless. The programme is highly effective at preventing this, with a 90% success rate (prior to the ban on evictions due to Covid-19). Feeling safe and secure is one of the Rebuilding Lives Support Programmes higher level outcomes.

## Support Needs

The most pressing support needs, as identified by the clients themselves are:

- Debt/budgeting **57%**
- Mental health **39%**
- Physical health **28%**
- Benefit issues **26%**
- Other **21%**
- No employment **20%**
- Addiction **17%**
- Legal issues **5%**

## Pathways to Poverty

Over the course of 2020 we have seen a big shift in the causes as to why households are referred to the crisis support programme:

## Health & Wellbeing

### City-wide Foodservice

**9,000 meals**
distributed each week

of which **3,986** go to children

### Eating better

**90%**
Developed better eating habits & diet

### Good Fresh Food

**44%**
of the produce provided is fresh **5-a-day foods**

### Healthier Weight

**41%**
lost or gained weight to improve health

### Overall wellbeing

**71%**
feeling healthier

**66%**
managing stress better



© The Matthew Tree Project 2021

## Work Status

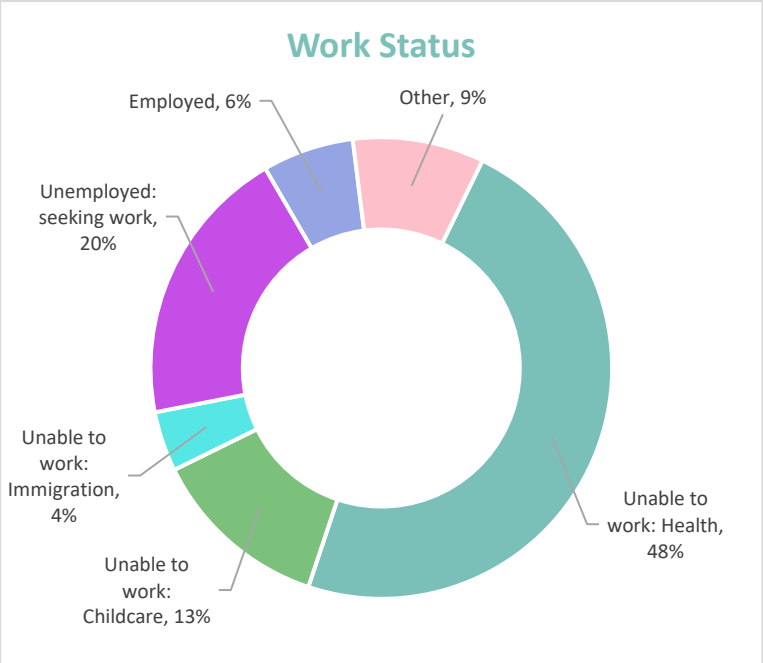
A staggering 64.7% of those referred to the programme are unable to work due to poor health (47.9%); childcare (12.6%); or immigration status (4.2%). These households are completely reliant upon the welfare benefit system for their income. The sad reality is that for far too many, it is woefully inadequate and impacts negatively on health; overall wellbeing; and future life chances where children are involved.

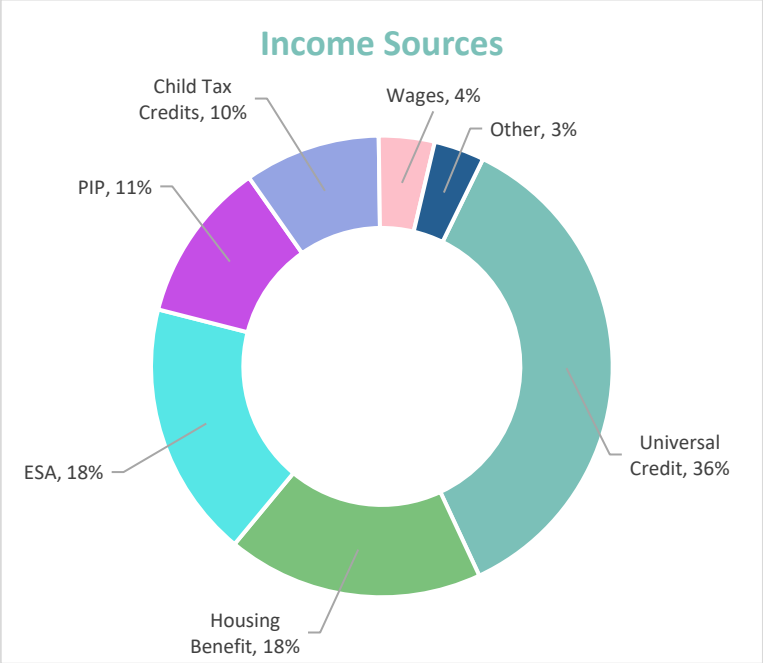
## Long-term Unemployed

As of December 2020, all unemployed clients are those furthest away from the job market (unemployed for 6 months or more). Statistically, long-term unemployment is the biggest barrier to securing a job and with competition for employment now so fierce, the future for these people is extremely challenging.

## Employed

Of those clients who are classified as employed 1.2% are on zero-hour contracts, often going weeks without any work; 0.7% have full-time work; 3.3% are part-time, many of whom have lost shifts or hours during the pandemic; and 1.2% are self-employed.




There are also 3.1% of clients who are retired; 0.4% are students; and 5.7% who prefer not to say.

## Client Set Goals

**57.4%** of the personal goals set by clients were achieved of significant progress was made towards them.

Typical goals include:

- **Learn English**
- **Get healthy**
- **Clear debts**
- **Start training course**
- **Get a job**
- **To be in my own home**
- **Feel better about myself**
- **Move to a safer home**



© The Matthew Tree Project 2021

# Recommendations

## Ethical Taxation Reform

It is widely accepted that in societies where there is less inequality there are fewer social and health problems, and the demand on publicly funded services, and therefore government spending, is greatly reduced.

Not all organisations and services/products are ethically equal. Some contribute more to health and social problems (fast food outlets, bookmakers); some are neutral (accountants, opticians); and some actually contribute positively towards better health and a better social fabric in society (health food shops, social enterprises, gyms, fruit & veg growers).

The 'polluter pays' concept should be central to a radically progressive and ethical tax system (corporation tax and VAT) that rewards organisations who contribute positively and penalises organisations who contribute negatively. The sugar tax recognises this concept but on its own does not go far enough.

## Start-up grants: Social Enterprise

Social Enterprise organisations make a significant contribution towards the social fabric of our local communities. They do not benefit individual shareholders but rather the wider community. We need to do all we can to encourage more social entrepreneurs to launch Social Enterprise's that tackle deep seated social and health problems.

Measures to stimulate and support **Social Enterprise organisations** to start-up are desperately needed. There has been a growth in the availability of 'social investment' funding but this is expensive and takes the form of a loan that needs to be paid back – with interest. This could be helpful for a social enterprise that is established and needs funding to up-scale but does not help where capital is needed for the start-up phase. Grant funding for the start-up capital needed by a Social Enterprise would enable more great social change ideas to become reality.

## Enable Charities to reclaim VAT

Analysis in June 2020 by independent charity Pro Bono Economics predicted a **£6.4bn loss of income** over the six months to December 2020 for the UK's 170,000 charities, leaving one in 10 potentially facing bankruptcy. Smaller, local charities are especially exposed to the crisis.

Office supplies cost The Matthew Tree Project 20% more than office supplies bought by a commercial company. This is because charities who do not trade are unable to reclaim VAT.

Charities – who make such a positive contribution to society – should not have to pay 20% more for goods and services than commercial organisations

At a time when funding for charities has been hit significantly by the pandemic this is just wrong and needs to be addressed urgently.



© The Matthew Tree Project 2021

## 4 Public Assets & Planning

### New Developments

For all new developments over a certain scale, planning permissions to be granted subject to a % of buildings & land being made available for affordable housing; food growing; community amenities; by way of long-term peppercorn lease, i.e. 35 years or more; for local community based social and health service providers.

### Publicly Owned Land

Central and local government to work with third sector representatives to establish a long-term strategic plan for publically owned land that accommodates the needs equally for housing, food growing, transport and public amenities.

### Non-Use of Capital Assets

Prohibit local councils from 'sitting on' capital assets for an 'open-ended' time. If the asset is not utilised by the local council within a reasonable time, it should be made available for asset transfer to a local not-for-profit organisation, and not sold to the highest bidder.

## 5 Discounts for those on Low Incomes

Being able to fully engage with all areas of 'normal life' is something most of us take for granted. Sadly, for those on low incomes this is not a reality. It is absurd that people on very low incomes should pay the same as those on high incomes for essential services and we are calling upon the Government to engage with the providers of the following 'essential' services to find ways to offer partial or full discounts for those on means tested benefits:

- **Fuel/energy**
- **Food**
- **Internet/phone**
- **School uniforms**
- **Public transport**
- **Adult re-training**
- **Rent**
- **Council tax**

The concept already exists for pensioners and students who receive various discounts including bus and rail cards and we strongly believe this should be extended to those in the lowest income decile.

## 6 Benefit System Reforms

Many of the reforms to the benefit system that we are calling for do not require additional funding. A small change in administrative procedure will make a big difference in the experience of many.

### Prisoner Pre-Release Protocols

Currently, someone being released cannot begin the benefit claim or housing bidding process until after they have left prison. This creates a period where they have no income and are homeless which is completely unnecessary. The dates when people are being released is known and it should be possible to change the system so that benefit claims and housing provisions can be applied for and granted before the release date.

### Universal Credit (UC)

Currently, when someone moves from legacy benefits onto UC there is a mandatory 'waiting period' of at least 5 weeks before UC benefit payments begin. However, the legacy benefit stops immediately meaning that for at least 5 weeks the claimant receives no



© The Matthew Tree Project 2021

income. This is inhumane and totally unnecessary. We are calling on the government to change the process so that legacy benefits are maintained until UC benefits begin. If, during this time, there has been an overpayment then this is reclaimed over time at an affordable rate for the claimant.

This one measure alone would remove up to 30% of The Matthew Tree Project clients overnight. It is fair to assume the same would apply to other crisis support providers right across the UK.

We believe that it is essential the £20 UC top-up that was introduced at the beginning of the pandemic is made permanent. The poorest in society have been hit the hardest by the pandemic, even with the top-up, and there is no case whatsoever that it is fair or reasonable to remove it.

## Abolish Benefit Cap

The benefit cap applies to larger families and as such unfairly penalises the children as it is impossible for them to be properly provided for. It is cruel and there is no rational argument for the benefit cap to remain in place as it has failed on every measure that was set for it. Furthermore, the DWP report that the benefit cap saves only 0.1% of the total welfare bill and this is just the money it takes from households' benefit income, and not any of the costs of administering the cap.

### CASE STUDY: N

Age: 32.
Referred to the Rebuilding Lives Support Programme by the Centre for Sustainable Energy

N's marriage broke down 5 years ago and he took custody of their 5 children; 3 of whom are now primary age and 2 secondary but were then all primary age. As his ex was the tenant of their home and wanted her new partner to move in with her, N and the children had to leave and went to live with his mother – sleeping on her living room floor. For a long time, his ex-wife was claiming the benefits for the children and not passing them on and he acquired significant debts. (His ex has since been denied access to the children by Social Services). He had been working as a scaffolder since he left school but had to stop to look after the children. After 9 months, Social Services found him a four-bedroom private rented house. By this time the "grace period" – when those who had previously been working can claim full benefits – had expired and the benefit cap kicked in immediately. He had to apply for discretionary housing payments but these are limited and eventually ran out. Now he has, after paying the rent, which was increased last March by the landlord, approximately £550pcm to feed, clothe, entertain and educate his children, and keep the home running.

He cannot see himself returning to work as a scaffolder due to his childcare commitments. He doubts whether he could manage without support of The Matthew Tree Project.

N enrolled in a training course in Spring 2020 but that had to be cancelled because of COVID. He cannot, at this point, see how his situation can ever improve.



© The Matthew Tree Project 2021

## 7 Establish FAIRNESS ALLIANCE

In 2014 Bristol City Council published the final report and recommendations from the work of the Fairness Commission. The panel was chaired by **Alison Garnham, Chief Executive of the Child Poverty Action Group** and consisted of local and national experts including the CEO of The Matthew Tree Project. The commission took evidence from a wide range of local service providers together with evidence from many who had/have lived experience of deprivation. Sadly, the next stage in this process never happened due to a lack of funding. It was to establish a Fairness Alliance Panel to oversee the implementation and progress of the recommendations. The issues the commission addressed; inequality; deprivation and fairness are even more pressing today than they were in 2014.

The Matthew Tree Project highly recommend that a Fairness Alliance Panel is created to review and update the findings from 2014 and then oversee the implementation of its recommendations.

## 8 Stimulate a Local Food Economy

For every £1 spent on food in a supermarket chain 80p leaves Bristol. For every £1 spent at a local independent trader, £1 stays within the Bristol economy. When the item purchased was produced within Bristol from natural resources, i.e. food, the wealth of the city itself increases.

Bristol has an abundance of natural resource and it is incumbent upon us to do all we can to stimulate local communities, local people, local economy, local council and create a framework which is conducive to the creation of a 'new and thriving' local food economy causing the proliferation of 'new' skilled and semi-skilled jobs, engaging communities to work together to solve their problems and build a better future, whilst at the same time protecting the environment and improving the quality of life for all citizens of Bristol.

This would be an exciting project which 'liberates' our natural under-utilised resources (land; buildings; unemployed / under-employed people) to create a range of city-wide strategically linked-up food activities which are positive for people; positive for our poorer communities, positive for the environment, and positive for the wealth of individuals and the wealth of the city.

When fully established, a project such as this and all the related stakeholder activities it would spurn will have a major impact on food security and food sovereignty for future generations and by producing a significantly higher proportion of the food we consume, money stays within the city and does not flow out to multi-national corporations elsewhere.

By creating a vertically integrated 'field-2-fork' working 'live-axis' of the four legs of the food chain (growing; processing; distribution; retail), barriers to entry are removed for others and it becomes viable for new enterprises to launch and existing ones to upscale.

Vertical integration also ensures a fair and equitable distribution of the margin earned across the whole food chain.

*For further information, see page 33.*



© The Matthew Tree Project 2021

## 9 Fund New TMTP Services

The Rebuilding Lives Programme is extremely effective as it provides a holistic joined-up approach to the full wrap-around service support it offers. This makes it much easier for people to engage with the help they need. The new or increased needs, as identified by the clients themselves, make a strong case for new services to be provided. New services require new funding. The identified service needs are not accessible elsewhere in the sector either because they are over-subscribed or conditions of access exclude some of our clients.

### Debt advice/budgeting

57% of clients say they need help with unmanageable personal debt and/or budgeting. Debt advice requires a qualified and skilled person and is very time consuming but is an absolutely essential, and growing, need. Money budgeting support does not require the same degree of expertise and by combining the two functions into one integrated service, the clients will receive the most effective overall solution. Debt advice services across the sector are massively over-subscribed and conditions of access can be a barrier to some of our clients.

### Counselling/mental health support

Here we are not referring to clinically diagnosed mental illness; but poor mental health caused by events such as: anxiety; abuse; fear; loneliness; exclusion; loss; bereavement; failure; depression; insomnia; illness; etc.

The Matthew Tree Project should employ a qualified full-time worker to provide effective first stage counselling support and develop closer working links with the wider mental health care providers.

Mental health services are massively over-subscribed with long waiting lists and are not so easy for clients to access due to the requirement for a health care professional, such as a GP, to make the referral.

A working group, overseen by Public Health England, should be established to develop a closer working partnership between frontline community based organisations, such as The Matthew Tree Project, and the mental health care providers so that (a) the community organisation is better equipped to do more; and (b) where necessary people can be referred to more specialised support by the community based organisation, so they get the help they need, when they need it.

### Language / interpretation support

The Matthew Tree Project have a number of clients who only speak their native language, which includes: Arabic, Bengali, Cantonese and Mandarin, Farsi, Kurdish, Punjabi, Somali, Turkish, Urdu, Vietnamese.

Providing weekly food supplies is all we can do for these households and as a result they tend to stay in the programme for a very long time. Bristol City Council provide an interpretation service but this is chargeable and extremely difficult to access.

The Matthew Tree Project needs to bring this expertise in-house so that these clients can get the help they need to move out of crisis.



© The Matthew Tree Project 2021

# Client Voice: Co-production

From 'Day One' 10 years ago, the foundation of The Matthew Tree Project has been built on a fundamental approach which is firmly rooted in co-production. This critical process is to harness the collective voice, experience and opinions of the people the charity seeks to help. Then, with key involvement from current and ex-clients, and those with 'lived experience'; working with the executive board, the service delivery team (staff and volunteers), and strategic partners; collectively we translate this 'intelligence' into effective services that meet the client needs most effectively.

No-one is excluded from the programme and every single client have equal voice in shaping how it develops. The insight gained by this approach is also used to affect systemic change where the system is unfair and people suffer unnecessarily. Our recommendations in this report has come by way of this process.

## KEY ELEMENTS TO THE CO-PRODUCTION PROCESS

- Long-term client engagement; typically, 3-6 months
- Create a safe and supportive environment
- Nurture open and trusting relationships
- Empower the client to be in control of their process
- Every client contact, formal and informal, is recorded; feedback is captured and acted upon
- Support is tailored to the client's ability to engage
- Front line service delivery team are given the autonomy to do whatever is needed for each client case
- Constantly ask fundamental questions, such as:
  - What needs to happen for you not to need us?
  - What do you want us to help you with?
  - How can we do better?
  - What kind of future do you want for yourself?
  - What new skills would you like to learn?
  - What is your dream job?
  - How are we doing?
  - How would you like to get involved in shaping and delivery of the programme?
- Encourage clients and ex-clients to become part of the delivery of services by volunteering and applying for vacant jobs within the charity
- Empower clients to decide when their case should be closed

All clients are regularly asked "how do you rate the support you have received from The Matthew Tree Project?" For 2020 the client rating rose from 90.9% in 2019 to:

**98.5%**

### Client Involvement

In 2020, on average, volunteers contributed **747** hours per month. The amount provided by current and ex-clients was:

**45.0%**



© The Matthew Tree Project 2021

# Rebuilding Lives Programme

'Rebuilding Lives' is a unique, innovative and pioneering early intervention crisis support programme, progressively developed by The Matthew Tree Project since 2010, which is available to anyone who is in crisis.

The programme is particularly effective at engaging with those who have slipped through the gaps of other support services across the sector.

**62.5%**

of clients are isolated and have no other form of support. They say that if it were not for The Matthew Tree Project they would have nowhere else to turn and wouldn't know what to do.

## Fully Inclusive

No-one, no ethnic group, no crisis type, no postcode, no age is excluded from access to the 'Rebuilding Lives Support Programme'.

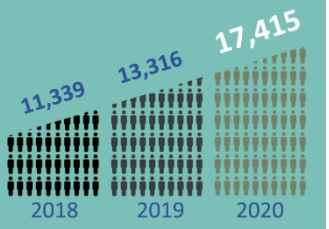
We have an extensive network of over 90 officially appointed referral agencies which includes statutory and voluntary organisations such as the council, advice agencies, schools, etc.

Referrals are made via a secure online portal on our web site. Each new referral receives a 'welcome' phone call within 24 hours of being referred where everything is explained and the client can tell their story.

Recognising how difficult and challenging it can be to come to somewhere new to ask for help, our online system enables us to make contact with those who are referred but do not come. A simple phone call to say "we were expecting you and are you ok" is highly effective in breaking down barriers that may be preventing someone from accessing the help they need.

## Key facts:

### Beneficiaries[1]




### Underlying Causes

**59%** understanding & acknowledgement of root causes / issues

### Isolation

**62.5%** have no other support and nowhere to turn to for help

**53%** of clients live alone

**52.9%**

feel less isolated since coming to The Matthew Tree Project

[1] *this is the weekly demand on the service, i.e. a family of 4 attending for 6 weeks would count as 24.*



© The Matthew Tree Project 2021

# The Client Journey

Every client has complete control over how much they engage with the programme and the speed at which they progress. Once registered as a client the household is supported for as long as necessary and until they do not need us anymore.

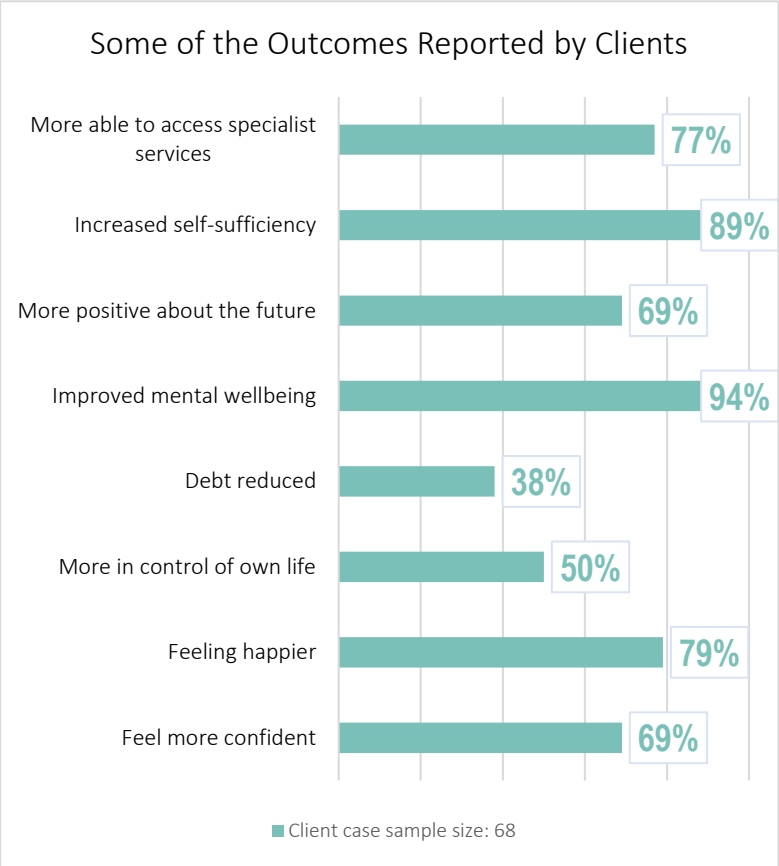
We place great emphasis on treating all clients with the upmost dignity and respect. A compassionate, non-judgemental approach is absolutely **essential** if we want to help people achieve sustainable, transformational change.

People only fully engage in an open and honest way when they feel they are in a safe, secure, supportive, non-judgemental place.

This level of engagement is **the key** factor in the effectiveness of the 'Rebuilding Lives Support Programme' and enables us to get to the heart of the matter and help people rebuild a better, healthier and happier future.

**'Rebuilding Lives Support Programme' enables people to:**

- Address the underlying causes of their crisis
- Improve health and wellbeing
- Set, and work towards, personal goals
- Learn new skills
- Make decisions about the support received
- Help shape the 'Rebuilding Lives Programme' that is supporting them




The Matthew Tree Project were proud to be selected as a 'Best Practice Representative' in the Parliamentary Review for community based health and social care services.

The Parliamentary Review
BEST PRACTICE REPRESENTATIVE



© The Matthew Tree Project 2021

# Full ‘wrap-around’ Joined-up & Individually Tailored Support Programme

**6 Higher Level Outcomes of the ‘Rebuilding Lives’ Social Change Model:**

- People feel safe and secure
- People have improved health & wellbeing
- People have support networks & feel connected
- People have improved resilience
- People have new or improved skills
- People have hope and a purpose

Since being established in 2010, The Matthew Tree Project has grown from operating one ‘Rebuilding Lives Support Centre’, to running five by 2020 - all of which are located in the most deprived areas of Bristol and South Gloucestershire.

The ‘Rebuilding Lives Support Programme’ enables people who are experiencing, or are at risk of hardship, to overcome the difficulties they are facing and to plan for a better future.

By working collaboratively with others, the ‘Rebuilding Lives Support Programme’ offer people advice, advocacy and support which matches their personal circumstances.

The aim is to look at the issues people face, and the underlying causes, from their basic needs, to their physical and mental health, to skills and employment.

People are supported to draw on their personal experiences to build on their skills and strengths so they are ready to seize the opportunities, and overcome the challenges, ahead.

‘Rebuilding Lives’ is a holistic, person centred approach which is a crucial part of developing the kind of relationship which builds trust and allows **support to be tailored to an individual** and their circumstances.

## Key facts:

### Volunteering

**747** average volunteer hours per month

### Children’s schooling

**47%** improved school performance of children

### Home Cooking Skills

**47%** Improved their cooking skills

### Money Management

**59%** gained ability to budget

### Client Involvement

**45%** volunteer hours provided by current and ex-clients



© The Matthew Tree Project 2021

# Client Goal Setting & Progression

**57%**

**set, and progressed towards - or achieved - personal goals in 2020**

When we first meet people who have been referred there is a tangiable sense of hopelessness. The experience of falling into poverty for the vast majority is soul destroying, degrading and painful.

Our first task is to re-set the situation: stabilise the crisis and give people 'hope' of a better future – belief that the problems and issues can be overcome and a renewed sense of focus and motivation to work towards a better, happier life.

We are patient with clients who upon arrival are often in a state of distress and confusion.

Falling into the poverty trap does not happen overnight. It is a long, painful and disempowering experience that can scar someone very deeply. This is why we do all we can to give 'control' back to the clients in every interaction we have.

The 'Rebuilding Lives Support Programme' is built around the people it seeks to help and is guided in what it does and how it does it by the clients themselves through formal and informal feedback, discussion and involvement.

**Co-production is central** to the development of the service: creating priorities, language and approaches among all those involved.

People with lived experience (clients and ex-clients; some staff; and some volunteers) work alongside everyone else to shape every aspect of the programme: bringing an empathy and experience to our planning, practical development and external communications.

### Examples of the personal goals clients set themselves:

- Learn English
- Get healthy
- Stabilise mental health
- Clear debts
- Get a job
- To be in my own home
- Find support in recovery
- Start training course
- Move to a better home
- Bring gambling under control
- Feel better about myself
- Retraining

### What is the Client Journey?

We refer to the time a client spends with us as their journey because we encourage clients to plot a pathway out of their initial situation. The client manages their own journey, including the decision that they no longer need our support. The journey metaphor is a useful way to frame their experience as a process they themselves are making, rather than something they are obliged to do by others.



© The Matthew Tree Project 2021

Prior to Covid-19 Britain's household debt mountain had reached a new peak, with UK homes owing an average of £15,385 to credit card firms, banks and other lenders, according to the TUC.

By December 2020, nearly 9 million people had to borrow more money because of the Covid-19 pandemic; the proportion borrowing £1,000 or more also increased from 35% to 45% since June 2020.

Household debt levels stood at 128.7% in Q3 2020.

There were 31,059 individual insolvencies in England and Wales in Q4 2020, up by 11,304 on the previous quarter. This is the largest increase since the current series began in 2010.

The Q4 2020 level is 9.4% higher than the level in Q3 2019.

# It can happen to anyone

People from all walks of life come through our doors including well-educated business owners and professionals. The unexpected happens. Sometimes, challenging circumstances - life events, ill health, lack of opportunity, a world-wide pandemic and a wide range of other individual and/or societal issues - intervene and can leave people in desolate and desperate situations.



© The Matthew Tree Project 2021

# Improving Health and Wellbeing

[Good] food is vital to sustain life and improve / maintain good health.

Food insecurity is a massive issue for the households referred to the programme. People are often in poor health, physically and mentally when they first arrive - missing meals, losing weight, weak and disorientated, low in confidence, confused and scared are all common traits displayed.

Our **Foodservice** improves physical and mental health and wellbeing so that people are better equipped to overcome the considerable challenges ahead and engage in life more fully.

When first launched in 2010, the charity was only able to offer people a selection of tinned and packaged foods, a listening ear and basic signposting. Whilst this was beneficial it was very limited in what it was able to achieve for people in crisis.

The charity is now able to provide a **professional city-wide home delivery Foodservice** - which promotes good health and wellbeing - alongside an expert full-time client navigation support service that ensures people get the help they need – in a way that works best for them.

The **professional Foodservice** provides weekly nutritionally balanced grocery supplies which includes fresh fruit, vegetables, dairy and meats for the whole family.

By the end of 2020 the charity was distributing food the equivalent of 9,000 meals a week and only differs from that of any other food retailer inasmuch as the food is provided free of charge at the point of delivery.

Clients are referred to the programme because they are penniless and this approach removes affordability as a barrier to a good food diet which we believe **everyone** should have access to.

**79%**

said they are

**happier**

© The Matthew Tree Project 2021

# The Power of Volunteering

The Matthew Tree Project has a small staff team and a large army of volunteers, without which this work would not be possible.

It is the policy of the charity to, wherever possible, involve clients and ex-clients in the delivery of services, either as volunteers or as employed members of staff.

This has a huge positive impact on the confidence, skills and self-worth of the client; whilst having a significant and very positive impact upon the quality of service support the charity is able to offer.

There is real power in the empathy one client can show towards another; whilst also being living proof that a better future is attainable with hard work and determination.

## Tina's Story

Tina first came to TMTP as a client and was also suffering with depression and anxiety. She had spent the last 20 years as a homemaker caring for her 5 children, and was low in confidence and self-belief. After some time, Tina expressed an interest in volunteering with the charity and started in the role of 'meet and greet' at our Community Hub Support Centre in Filwood. Tina quickly became a key member of the service delivery team. In March 2020 as Covid-19 struck, Tina rose to the challenge of becoming a client telephone support volunteer, learning new skills, and blossomed. Tina then moved on to work with the Foodservice team at our food distribution warehouse and now divides her time between both teams volunteering 4 days a week. Tina is no longer a client and is now also employed one day a week as a food warehouse operative and cleaner.

*Above: Tina providing client telephone support at our central Bristol office*

When asked what volunteering has done for her and what it is like to volunteer with TMTP, Tina said:

***"Volunteering has really boosted my confidence and steadied my mental health, I am learning so many new skills; able to talk to people both on the telephone and in person with more ease and it has enormously improved my computer skills. It has also helped me to get into work - something I never thought would be possible.***

***I love volunteering for The Matthew Tree Project, it doesn't feel like work, it's like a second family to me, and it makes me want to get up in the morning."***



© The Matthew Tree Project 2021

In addition to the vital role clients and ex-clients play in the development and delivery of services, many people, from all walks of life, are drawn to volunteer for The Matthew Tree Project, for many different reasons.

What everyone has in common, is compassion and a determination to make a difference.

Mark Goodway, the Founder and CEO of The Matthew Tree Project said:

***"It's is a privilege and an honour to have had the opportunity to work with so many amazing people over the years and to see what we have been able to achieve together."***

One such person is Chris Cook who has been volunteering with the charity since the Autumn of 2019.

Chris (pictured above in his role as volunteer van driver collecting surplus food from a major distribution centre near Bristol) commented:

***"I retired after 35 years as a shop keeper and started volunteering for The Matthew Tree Project immediately. I've been volunteering for over 15 months now and I thoroughly enjoy it, and look forward to coming to TMTP every day. I feel useful and it has given me a sense of purpose, and a strong feeling of goodwill that I am doing something for the community."***

The services provided by the charity are highly professional and as such volunteers undertake the same training and supervision as our staff, for the role they are in, be it food handling and storage for the foodservice team; or 'help through crisis support' for the front line client engagement roles.

*Below: a small selection of the volunteers who have been involved during the past 10 years.*

# Client Case Study

Systemic failure can take many forms. In this case poor and conflicting advice from Job Centre Plus (JCP) staff and officials from two local councils created a completely unnecessary crisis that spiralled out of control causing significant human suffering to the parents and the children. It also incurred great expense to the tax payer by way of publicly funded services that were subsequently involved. A more joined-up and consistent approach from local councils is desperately needed and much better training for JCP staff.

## CASE STUDY: R

R is a 29-year-old female diagnosed with bi-polar disorder.

R self-referred by turning up at our Filwood Support Centre in January 2020. R told us her story and we accepted her as a client. R was 7 months pregnant.

She and her partner, along with their four children, had recently arrived in Bristol after having been evicted from their council home in Cornwall. This was due to rent arrears brought about by confusion concerning her partner's irregular zero-hour employment and its effect on their eligibility for Housing Benefit, which they should have claimed but didn't know.

Cornish council staff advised them to leave their home before the bailiffs came and as they had family in Bristol they decided to make a fresh start where there were people to support them. Things did not work that way, however, because Bristol City Council decided they were intentionally homeless and therefore not entitled to go onto HomeChoice. Nevertheless, because of children, Social Services got involved and placed the family in emergency accommodation.

During this time, we were supporting R and her family, practically, with food, and also emotionally. We enlisted the debt advice services of one of our strategic partners, SPAC.

R gave birth to her fifth child who was poorly and initially was not released from hospital, causing anxiety.

Then the first lockdown came. R found it helpful to be able to speak to someone regularly amidst the isolation via our telephone support service. This was particularly important to her as the family were getting harassed by a neighbour. They also felt cramped in the small flat they were allotted. After two further moves, they settled into a home. Social Services had no criticism of their parenting abilities. They redecorated their new home and we helped with a grant for flooring. Her partner found a job and they closed their case.

Then came the second lockdown and her partner lost his job so they returned for support. He volunteered to help us in the warehouse and was very reliable.

Her partner then found another job and R said that they would not need food aid but would like to stay as clients so that they could get continuing emotional and practical support as and when they needed it. This happened immediately; we provided a laptop - donated by strategic partner Digi Local - so that R's children could do their schoolwork.



© The Matthew Tree Project 2021

# Client Case Study

CASE STUDY:
**S**

S, 58, referred herself to TMTP in June 2019. S had been living 'off grid' for the best part of 40 years, in caravans and live-in vehicles as part of the 'new age' travelling community. S supported herself with casual jobs on the land or at festivals and prided herself on being self-sufficient and resourceful. S had been ordered to leave the static caravan she was living in by the council. S moved into a tent on a friendly farmer's field and was anxious the planning department would find her again.

It became clear that S had deep-seated anxiety and was fearful of the authorities. S had once tried to claim benefits but found the process so hostile and humiliating she vowed never to try again. S had long-standing medical problems arising from a road traffic accident when she was 20 but had encountered an unsympathetic GP and so stopped seeking treatment. S was in constant pain with an arthritic spine and other, undiagnosed, problems. It was clear that S needed to change her entire way of life and this frightened her. It was therefore necessary to proceed in three stages: finances; health; and then housing.

After much discussion, we supported S to make a claim for Universal Credit, accompanying S to the first two interviews at the Job Centre. S was relieved to find that her job coach was friendly and fully accepted that she was not well enough to work. S then suffered a ruptured appendix and was admitted to hospital. After discharge, she developed post-operative problems and had to be re-admitted.

After her second discharge, we supported S to visit a GP and, to her surprise, she found the doctor to be empathetic and clearly concerned for her well-being. She obtained the necessary fit note for the JCP coach and the doctor discussed setting up a holistic treatment plan, including mental health support. The scans performed at the hospital also showed the extent of the internal damage from her earlier accident.

Housing was now the next hurdle and S was very resistant to asking the council for help - fearing that she would be placed in emergency housing that she would not be able to tolerate. We supported S in visits to the Housing Dept. who accepted their homeless duty to her but also agreed that they would waive the rule that she must accept any offer they make.

S feared being in a house – away from the direct contact with the elements that she was familiar with. She feared the responsibility of paying bills and being tied down. It took her a long time – during which she had regular emotional support from TMTP – before finally, in January 2021, S accepted a bungalow in a supported housing estate in a small village.

In partnership with her new Housing Support Worker, we made applications to various charities to get essential furniture and also a small temporary cash grant in order to help her settle in her new home.



© The Matthew Tree Project 2021

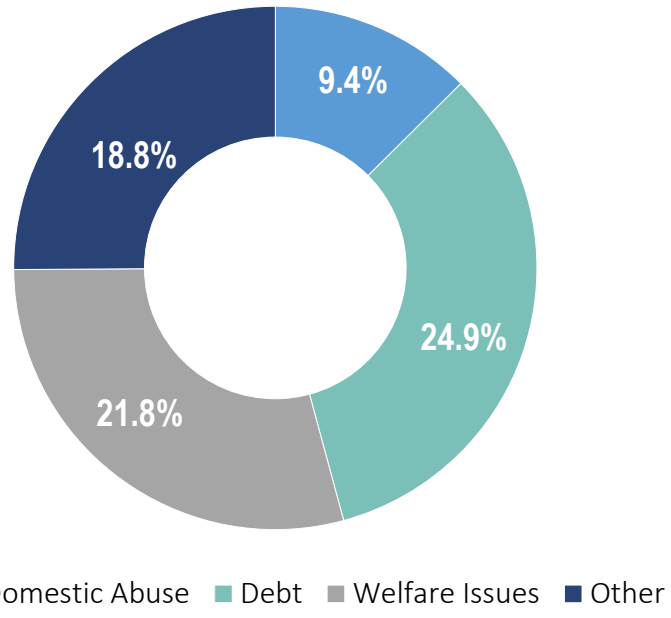
# Poverty Drivers

A key question we ask each client upon first arrival is the reason why they need our support.

All clients have multiple and complex issues but we are interested to know what caused the 'tipping point' or 'the straw that broke the camel's back'.

Knowing this enables us to help people more effectively and it also provides us with a unique insight into what systemic issues need to be addressed by national and local policy makers.

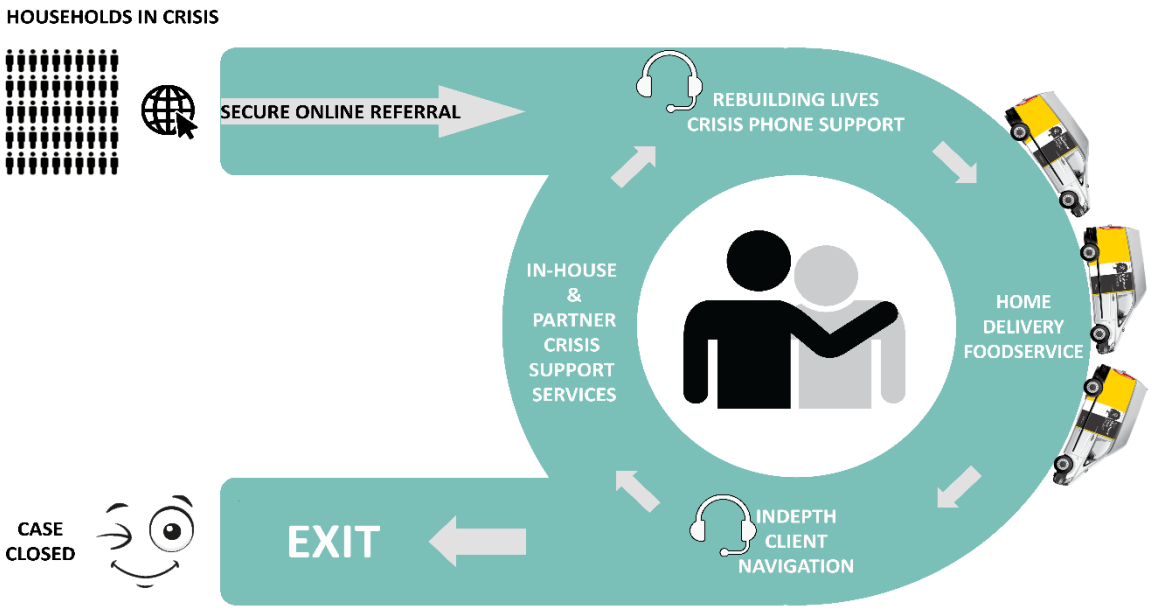
**The reasons why people are referred to the 'Rebuilding Lives Support Programme'**






© The Matthew Tree Project 2021

# Collaborative Partnerships




By working collaboratively with a wide range of strategic partners, the 'Rebuilding Lives Support Programme' is able to offer people advice, advocacy and support which matches their personal circumstances.

Partnership networks sit on either side of The Matthew Tree Project. On the one side are the 90+ officially appointed referral agencies who refer people in need to the 'Rebuilding Lives Support Programme'. On the other side are the key strategic partners who provide different support services in a joined-up way.

The support provided is personally tailored to each individual case and most importantly, the abilities of each person to engage with the help they need.

The client determines the plan for their future and is in complete control of the process throughout, including the closing of their own case when they do not need our support anymore.

*"our clients are at the centre of everything that happens in relation to their situation. We maintain a close relationship which ensures nothing slips through the gaps."*

MICHELLE GOODWAY
CHIEF OPERATING OFFICER
THE MATTHEW TREE PROJECT

**Some of the KEY strategic partnerships:**

- St Paul's Advice Centre
- Centre for Sustainable Energy
- St Monica Trust Community Fund
- Bristol Drugs Project (ROADS)
- Assertive Contact & Engagement Team (ACE)
- Future Bright
- ACFA



© The Matthew Tree Project 2021

# Systemic Change

The Matthew Tree Project is a nationally recognised pioneer in systemic approaches for the alleviation of poverty in the UK.

Using the unique insight provided to us by our client group (client voice) we aim to Influence policy makers and create a systemic environment that is more fair and conducive to enabling citizens living in deprived communities to improve their income, health, wellbeing and quality of life.

The close relationship we develop with our client group enables us to capture the whole client experience and then by using this 'intelligence' give the client a voice to influence policy makers and seek to create a systemic environment that addresses social injustice and inequality.

The data collected by the programme is made available to local councils and national government in a very constructive way and is always supported by real-life case studies.

16% of clients are referred to the programme due to welfare benefit delays. In November 2018 we wrote to the Secretary of State at the DWP arguing; instead of all benefit payments being stopped when someone's situation changes, until a decision is made - which can take months – the current award should continue whilst the decision is being made. There has been some movement in this direction but there is still some way to go for the system to be not so inhumane.

**The Matthew Tree Project is recognised nationally by**

- Key contributor in the 2014 national inquiry into food poverty in the UK
- Best Practice Representative in the 2020 Parliamentary Review
- One of only 69 projects in the £33m 'Help Through Crisis' nationwide programme
- Winner of the 2020 Bristol Prestige Award for 'Best Charitable Community Services'

**The unique insight captured by the programme is due to:**

- No-one is excluded which means we don't only support one group or crisis 'type' but we see the effects of policy decisions across the board, on everyone and anyone who falls into a crisis situation
- The close and open relationship we develop with each client affords us a deep understanding of the realities of life; the causes of different crisis situations and the barriers to progress out of crisis
- 'Rebuilding Lives' is an 'early intervention' and 'long-term engagement' programme so we don't just see a snap-shot moment, which can be very misleading, but the whole client experience over time

**22%**

of referrals

caused by BENEFIT issues



© The Matthew Tree Project 2021

# Theory of Change

## Case Management & Reporting

As we work with clients we record any positive or negative change they tell us about and place it within the context of our **'Theory of Change & Social Impact Measurement Framework'** which underpins the 'Rebuilding Lives Support Programme'.

If a client tells us, for example, that their benefits are now in payment we would record a positive outcome for the payments and also another for the fact their financial situation has improved. By classifying these two positive changes and mapping them to the Theory of Change outcome groups we arrive at a count of positive change outcomes which measures the impact of our work with each client.

So the client's benefit payment success will count towards 'Reduced Material Deprivation' and also 'Increased feeling of being in control of money/budget' as well as some Theory of Change measures.

Some of the outcomes in the Theory of Change Framework can occur frequently, such as the client having a more positive outlook or feeling happier, others will mostly be one time changes such as moving to better accommodation.

Over the course of the last 3 years the 'Rebuilding Lives Support Programme' have designed a bespoke online case management software system based on the Apricot platform. Impact data is being collected at every interaction the client has with the programme.

The case management system enables us to understand and improve the level of support provided and also report on the impact of the programme to stakeholders and policy makers.

**The Matthew Tree Project long term goal is two-fold:**

- Working holistically, to empower disadvantaged people to take control and live dignified, fulfilling and self-sufficient lives
- Engage with policy makers, locally and nationally, to effect systemic change and create a fairer and more equal society for the benefit of all

**6 higher level outcomes of the 'Rebuilding Lives**

- People feel safe and more secure
- People have support networks and feel connected
- People have new or improved skills
- People have improved health and wellbeing
- People have improved resilience
- People have hoper and a purpose

*"We believe we are pioneering the creation of a 'blue-print' that can be replicated in urban environments across the UK and Europe thus addressing poverty, at its root, on a significant scale."*

MARK GOODWAY
FOUNDER
THE MATTHEW TREE PROJECT



© The Matthew Tree Project 2021

*The present wrapping evening this year was dominated by Covid measures but all had a great time nonetheless. Above: some of the fabulous volunteers wrapping the gifts and the team delivering them to the children.*

# Christmas Gifts for our Children

One of the most damaging effects of living in poverty is the psychological scars caused by being excluded from 'normal life' activities that are happening for everyone else all around.

This is even worse for parents who are powerless to intervene and have to witness their children being unable to partake in the things that all the other children enjoy.

Christmas, in particular, highlights the stark reality of poverty.

The Matthew Tree Project's holistic approach considers fully all aspects of life and we work extremely hard to make positive interventions wherever possible.

We are very fortunate that we enjoy the support of a number of large employers in Bristol who every year put out a call to their employees to select one of our children to buy a brand new Christmas present for to a value £15-£30. The gifts are then collected by our team and we have a Christmas present wrapping evening during December each year. The wrapped gifts are then given to the parents at the last support session before the Christmas break, to give to their children to unwrap on Christmas Day.

We all had a great 'socially distanced' evening at our offices with music, food and fun wrapping the 300+ brand new donated gifts.

*We would like to say a massive "THANK YOU" to everyone who purchased a brand new gift for the children under our care. Some of the gifts were unbelievable, costing much more than the £10-£15 guide we gave. The compassion being shown by so many, in so many ways is truly heart-warming.*

© The Matthew Tree Project 2021

# RISE Social Enterprise

## Future Sustainable Food System

RISE Social Enterprise is a trading subsidiary wholly owned by The Matthew Tree Project charity which is focused entirely on the development of a local sustainable food production and distribution model.

The RISE vision is to contribute towards the creation of a local circular food economy model that will reduce the destructive socio ecological impacts associated with the current production, distribution and retail of food.

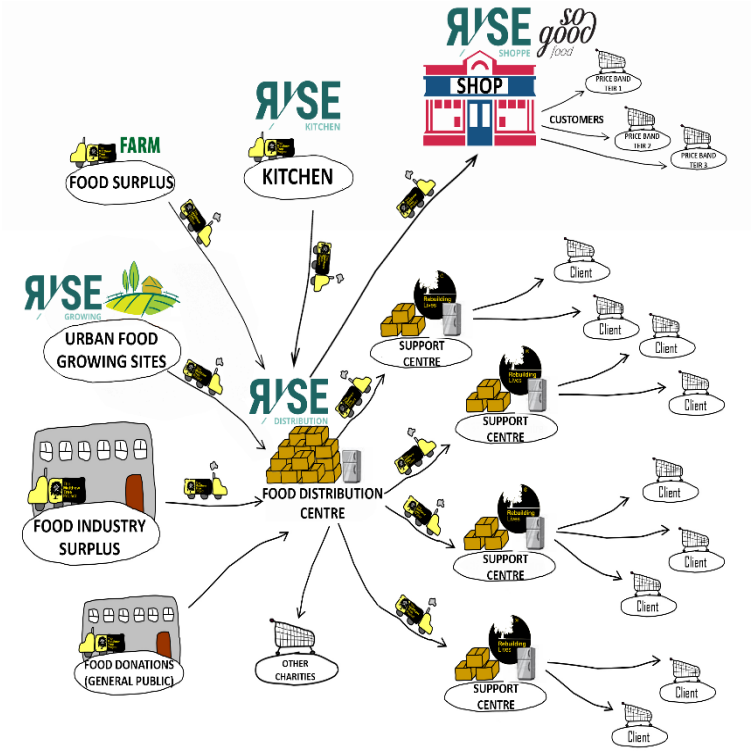
A new system which vertically integrates a local food supply chain by working with strategic partners at a city scale can bring together innovations in regenerative production, skills building, market development, food systems mapping, multi-tiered pricing, nature recovery, community-led land management, low carbon distribution infrastructure.

RISE seeks to remove affordability as a barrier to a good and healthy diet. The objective is to make nutrient rich food accessible, and desirable to those who need it most.

The innovation driving this vision is to design-out inequality & environmental damage. Instead forming a holistic, sustainable, demand-side led localised new city food system.

Such a model is unique in that it creates an expertly 'joined-up, whole supply chain' system that meets the food/nutritional needs of the poorest citizens; creates a fair, equitable and sustainable food production and supply chain; and radically reduces damaging environmental impact.

The innovative model harnesses local natural and built, under-utilised, resources such as land (green and brown field sites); empty buildings; and labour (the under-employed and unemployed).






© The Matthew Tree Project 2021

*The main food distribution centre in Lawrence Hill, Bristol; Mobile FoodStore & temperature controlled vans*

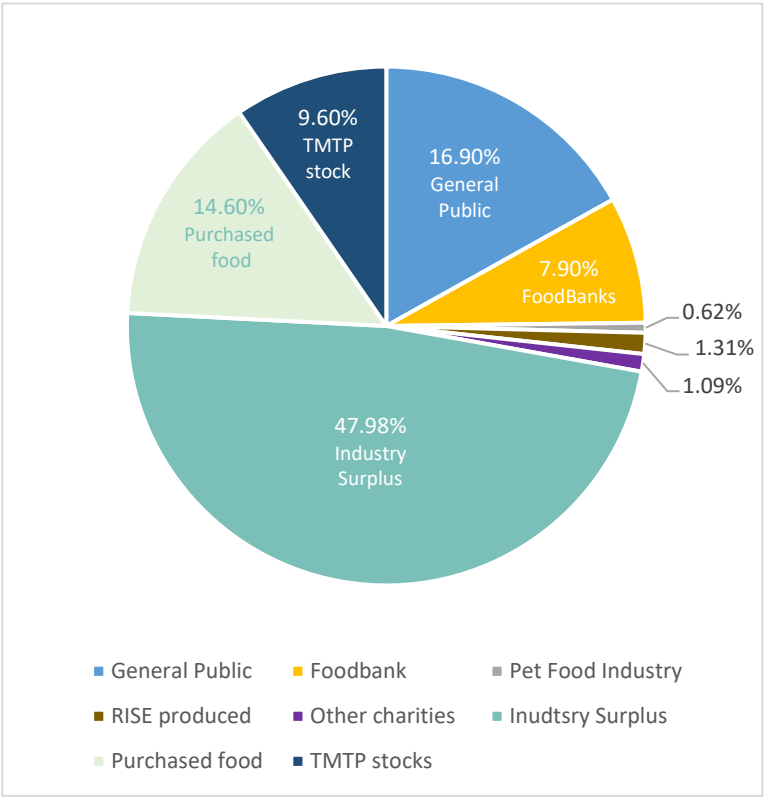
# City-wide Food Collection & Distribution

A key element of the Foodservice provided by The Matthew Tree Project is the full range of nutrition represented in the food distributed consisting of the full range of foodstuffs: chilled; fresh; frozen; and ambient.

Each household is given a weekly allowance of each food group based on what makes a healthy meal according to the 'Eatwell' plate. Within their allowance clients can then choose the foods they like.

Due to the Covid restrictions upon the hospitality sector donations of surplus foods from the food industry fell for the first time. In 2020 we collected 83.3 tonnes from a peak of 115.4 tonnes in 2019. This was especially challenging as Covid-19 also caused a steep rise in client numbers. Thankfully, the loss of industry surplus food donations was partly made up for by way of donations from other charitable organisations, and a government grant of £62,500 for the purchase of food. In addition to this, we were able to draw down on 16.6 tonnes of food we had in stock at the end of 2019.

Below: **SOURCES** of food distributed in 2020:






© The Matthew Tree Project 2021

The Matthew Tree Project work very hard to ensure all food received gets to the clients – the people who need it the most. However, as much of the food donated is perishable foods with very short shelf life, sometimes we ourselves have a surplus.

To ensure as little food of this surplus as possible actually gets wasted the charity has developed sophisticated processes that redistributes any surplus for beneficial use.

### How TMTP food is distributed in order of priority:

89.4% - Clients
5.12% - Other charities
1.91% - Fareshare SW
1.75% - TMTP events
0.56% - Animal feed
0.14% - Composting
0.81% - Waste

**44% of the food distributed is fresh 5-a-DAY foods**

Some of the charities who receive food from The Matthew Tree Project include:

- **Community Fridge**
- **Community Café – The Park**
- **Bristol Refugee Rights**
- **Super Supper Club**
- **Bristol City Mission**
- **Zenz**
- **Salvation Army**
- **Cat & Dogs Home**
- **Borderlands**
- **St Nicholas of Tolentine**

**163,890**

**meals provided to children in 2020**

© The Matthew Tree Project 2021

## Key Facts:

*Above: Some members of TMTP Foodservice team, hard at work (top); and receiving a donation of £960 from Bristol Freemasons (bottom).*

**159**
tonnes collected

+

**174**
tonnes distributed

=

**333**
tonnes handled

# Reducing Food Waste

The vast majority of the food collected from the food industry are foods that never get to the store in the first place but are deemed surplus to requirements at the distribution depot.

During 2020 we saved 83.4 tonnes of food from being thrown away. To handle these volumes of chilled, frozen and fresh foods in accordance with the strict hygiene and safe handling regulations is a highly skilled and demanding operation.

The distribution hub is fully equipped with two walk-in fridges and one walk-in freezer.

# Urban Food Growing

Food is our vehicle to educate, empower and help people move on from entrenched systematic deprivation.

We are tackling this by starting at the heart of the problem, Filwood and Hartcliffe are in the top 1% of most deprived wards in the UK.

This is where the largest Matthew Tree Project Rebuilding Lives Support Centre; our largest food growing site, the RISE food processing kitchen, and the RISE food shoppé/café are all located.

By seeding the local food economy within deprived communities we are providing the opportunity to permeate and advocate for positive social change.

In 2021 we are committed to the expansion of our community food growing activities and are seeking a larger plot of land in the region of 5-acres. A plot of this size will enable us to demonstrate fully all the positive impacts that can be achieved and will significantly increase the volume of food produced.

**The principles that underpin our food growing activities**

- Soil management and improvement, i.e. crop rotation; balance between permaculture & agriculture, trees, wildlife, environment
- Sustainability, irrigation systems; alternative energy; food storage (undersoil cold food storage)
- Natural/organic, non-use of fertilisers, pesticides & chemicals
- Composting
- Training/teaching/skills, i.e. home-growing; small scale (allotment); larger-scale (commercial)
- Schools/next generation education/engagement, i.e. legacy
- Innovation – the difference compared to the standardised global industrialised food production model
- Use of new technology / circular systems
- Replicability
- Long-term financial viability

*Nat, delighted with the naturally grown food produced by RISE*



© The Matthew Tree Project 2021

# Food Processing Kitchen

The first commercial grade RISE kitchen is located in Filwood Broadway, Knowle, and is focused on the production of a great range of nutrient rich food products which will be accessible to those who need it the most at affordable prices.

## The Pilot

From April – May 2020, in partnership with Boston Tea Party, we produced a fabulous range of food products primarily from our short shelf life surplus food.

**The objectives of the RISE kitchen are:**

- Provide skills training and [good] employment opportunities to unemployed/under-employed local resdients
- Reduce food waste by making food products out of perishable foods which would otherwise have to be thrown away
- Make a financial contribution towards long term sustainability of The Matthew Tree Project
- Contribute towards an upscale of local [good] food products being made available into local deprived wards (food deserts) at affordable prices by way of an innovative 'three-tier' pricing model
- Widen the food experience and cooking skills of local residents
- Contribute towards an improvement in health and wellbeing and quality of life for those on low-incomes
- Creatively engage with children and schools to positively impact the health and food experience of the next generation

The food products produced were then distributed to our clients under our 'So Good Food' brand. They were unbelievably popular.

Food Products included:

- Chicken Soup
- Cauliflower & Broccoli Cheese
- Spicy Halal Chicken Curry
- Vegetable Bake
- Leek & Potato Soup
- Curried Parsnip Soup



© The Matthew Tree Project 2021

# Food Shoppé and Café

Food is our fuel, and a nutritious diet is vital to support greater health and wellbeing. However, many disadvantaged communities have significantly fewer local outlets for fresh, healthy, affordable food; making it unobtainable for those who need it most.

Our innovative and socially responsible model will work with local growers and providers across the city, to bring healthy food to target areas, beginning with the pilot shoppé at 25 Filwood Broadway.

The 'SO GOOD FOOD' shoppé will seek to change eating habits to healthier choices, through greater access to better food and knowledge about how it's grown and cooked.

Using tools, such as attractive branding; tiered pricing; tasting sessions; and fun cookery classes to encourage healthier choices. RISE will be a catalyst to raise aspirations, create stronger inspired communities by gathering citizens in a common aim to address these problems together.

RISE Social Enterprise food production and distribution activites are demand-side led – driven by the demands of the people it serves.

**The principles of the 'SO GOOD FOOD' SHOPPÉ**

- Membership scheme
- Provide hot and cold food to eat on the premises, café style
- Provide food products to consume at home
- Multi-tier pricing making [good] food affordable for those on low income
- Provide training places that can lead to industry recognised qualifications and career pathways
- Engage with local children by way of school visits and work experience placements – embedding good food system principles in future generations
- Locally rooted and shaped by the people it serves
- Objective to increase footfall to the Broadway (or location of future shops) to the benefit of other independent traders
- 'SO GOOD FOOD' shoppé to be located in recognised 'food desert' communities



© The Matthew Tree Project 2021

# 10 years of rebuilding

OUR STORY

It was a Sunday morning in the summertime of 2010. I drove to church through Stokes Croft and as I waited at the red traffic light just outside Hamilton House, to my left side I noticed an elderly gentleman laying on the pavement motionless. He was dressed in jacket, tie and shirt. Admittedly, all had seen much better days but I felt it was an admirable attempt to retain at least some degree of dignity in the face of such humiliation.

People walked by going about their day, it seemed not even noticing the man on the floor. The immense sadness of the sight struck me to the core. This is someone's son. Maybe someone's father, brother or uncle. It was all so wrong. The light turned green and I drove on the 300 yards or so to my church in Jamaica Street. I got out of my car and locked the doors. I went into the church with a happy to see you 'good morning' to those I passed on the way to my seat.

Then, as I sat down in the chair I suddenly realised I had done the exact same thing as everyone else and just passed by the man on the floor.

I felt ashamed of myself and vowed there and then to do whatever I could to help the many 'people on the floor' and not walk by ever again. This was the moment I decided to establish a charity to tackle the problem.

I had no idea what I was going to do or how I would do it but just felt I had to at least try. Now, all these years later, I see the hundreds of amazing people who give of their time and money so freely to compassionately help the people off the floor because they too are not prepared to walk on by, and my heart jumps for joy.

Mark Goodway
FOUNDER

10 years
Est. 2010

The Matthew Tree Project®

RISE
SOCIAL ENTERPRISE

# Client Comments

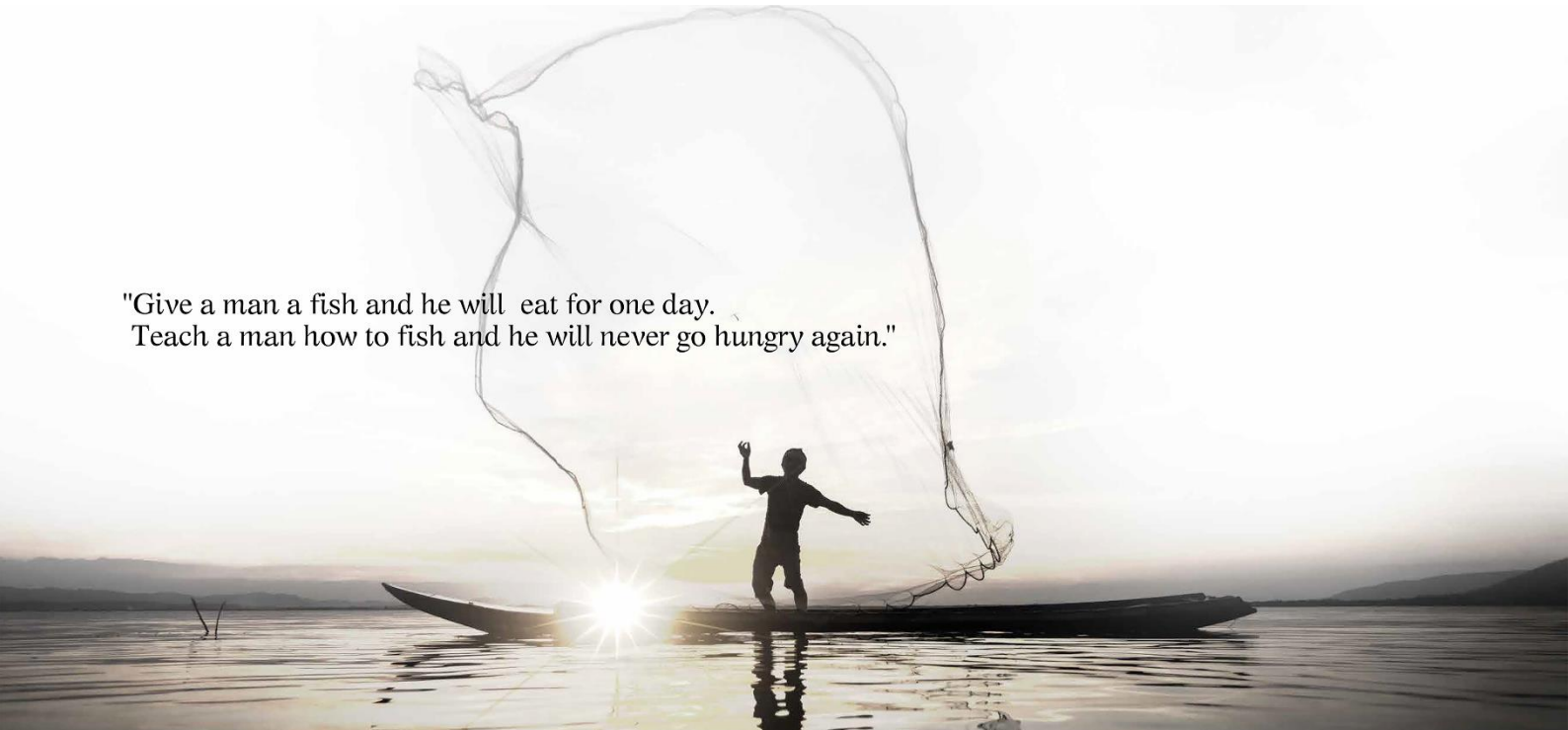
On the next two pages are just a few representative comments of the hundreds we receive from the people who go through the programme.

*"All at The Matthew Tree Project, myself and family owe you so much for all the help and support you gave us in time of need. Thank you all so much for all the food which helped tremendously. Also for the help with CV which was very grateful as I have now managed to get a job after such a long time. Also the friendliness you all showed without being judgemental, the laughs and chats will be missed. There will be times when I will be able to pop in for a chat and keep you up with progress. You haven't quite got away from me yet (ha ha). Thank you again very much appreciated and truly grateful. Friends for Life."*

*Ex-client of The Matthew Tree Project*

*"When I was at rock bottom you pick me up, supported me, made sure I had healthy diet. You all have been so brilliant, listening, giving me smile when all I could do is cry. I've come back today not for food or support but to say THANK YOU."*

*Ex-client of The Matthew Tree Project*



*"My quality of life has improved with help emotionally and a better diet. I've actually put on weight. I'm very grateful to you all. Staff are amazing, make you feel most welcome. The environment is welcoming, everyone so kind, caring and loving make me feel important, and not alone. Someone's caring for me and has my best interest at heart. Forever grateful xxx"*

*Ex-client of The Matthew Tree Project*

*"Well I have changed my life by coming and getting the support I need. You guys are fantastic and I'm very grateful for all the help I receive. Thank you!"*

*Ex-client of The Matthew Tree Project*

*"Couldn't wish for better people, all the staff were there at my lowest and darkest place and they took the time to listen and talk to me when no-one else did. They are amazing. Couldn't get through it without them. They will always be in my heart and will always be forever grateful and thankful. To all the staff, my life would be nothing without them."*

*Ex-client of The Matthew Tree Project*

# Rebuilding Lives 2020 Factsheet

| Measure | 2020 | 2019 |
|---|---|---|
| | | |
| Number of unique beneficiaries | | |
| Adults | 55.7% | 58.6% |
| Children | 44.3% | 41.4% |
| Number of people being supported at any one time (case load) | 667 | 320 |
| | | |
| Single person households | 52.6% | 45% |
| Families | 47.4% | 55% |
| Number of people supported | 17415 | 13316 |
| | | |
| New case referrals during period | 240 | 350 |
| Number of different agencies referring | 26 | 50 |
| | | |
| Average length of support provided (in weeks) | | |
| All cases | 28.6 | 18.2 |
| | | |
| One-2-One crisis support sessions provided | 4584 | 2849 |
| | | |
| Length of time supported provided (in weeks) | | |
| 1 | 7.7% | 17.3% |
| 2-6 | 13.8% | 30.9% |
| 7-12 | 10.9% | 15.0% |
| 13 – 18 | 10.1% | 7.8% |
| 19 - 54 | 25.4% | 19.7% |
| 55 + | 32.1% | 9.3% |
| | | |
| Clients without any other support | 62.5% | 69% |
| | | |
| Client age groups | | |
| 16 - 25 | 7.1% | 8% |
| 26 - 40 | 40.1% | 37% |
| 41 - 60 | 43.7% | 46% |
| 61 + | 9.2% | 7% |
| Unknown | 0% | 2% |
| | | |
| Average monthly volunteer hours | 747 | 405 |
| | | |
| | | |



© The Matthew Tree Project 2021

| Measure | 2020 | 2019 |
|---|---|---|
| | | |
| Client employment status | | |
| Casual labour | 0% | 0.2% |
| Employed full-time | 0.7% | 2.1% |
| Employed part-time | 3.3% | 5.1% |
| Employed zero hour contract | 1.2% | 0.8% |
| Unpaid Maternity leave | 0% | 0.2% |
| Retired | 3.1% | 1.4% |
| Self-employed | 1.2% | 0.4% |
| Student | 0.4% | 0.4% |
| Unable to work – childcare/carer | 12.6% | 10.4% |
| Unable to work - health | 47.9% | 43.6% |
| Unable to work – Asylum/Immigration status | 4.2% | 6.4% |
| Unemployed | 19.7% | 14.6% |
| Unknown | 5.7% | 14.4% |
| | | |
| Client original referral crisis type by group | | |
| Asylum/Immigration | 5.6% | 8.0% |
| Unmanageable personal debt | 25.0% | 22.5% |
| Welfare System Issues | 22.6% | 31.1% |
| Other | 46.8% | 38.3% |
| | | |
| Client risk of homelessness | | |
| None | 14.5% | 36.4% |
| Low (but possible) | 26.1% | 25.2% |
| Medium/High | 63.8% | 38.4% |
| | | |
| | | |
| What clients tell us they need support with | | |
| Mental Health | 39% | 31% |
| Physical Health | 28% | 17% |
| Addiction | 17% | 14% |
| Benefit Issues | 26% | 24% |
| Debt | 57% | 42% |
| Legal issues | 5% | 2% |
| | | |
| Overall how would you rate the support you received from TMTP? (% - 7 out of 10 or higher) | 98.5% | 90.9% |
| | | |
| Client Goals showing some progress or achieved | 57.4% | 63.0% |
| | | |



© The Matthew Tree Project 2021

| Measure | 2020 | 2019 |
|---|---|---|
| | | |
| Reported changes (over a period of at least 6 weeks) | | |
| Sample size (cases) | 68 | 260 |
| Feeling happier | 79.4% | 61.5% |
| Feeling calmer | 70.5% | 50.8% |
| Managing stress better | 66.2% | 46.2% |
| More positive about the future | 69.1% | 56.9% |
| More able to access specialist services | 76.5% | 75.0% |
| Increased self-sufficiency | 89.2% | 87.0% |
| Improved independence and resilience | 92.0% | 92.0% |
| Improved self-belief | 80.0% | 80.0% |
| Feel more confident | 69.1% | 92.0% |
| Increased aspirations | 78.0% | 78.0% |
| More in control of own life (choices etc.) | 50.0% | 92.0% |
| Developed new skills to be able to earn a living | 50.0% | 50.0% |
| Improved budgeting skills/making money go further | 58.8% | 44.0% |
| Debt has reduced | 38.2% | 38.5% |
| I have done skills training or other courses since coming to TMTP | 7.2% | 33.8% |
| Improved cooking skills | 47.1% | 36.9% |
| Eating better | 89.7% | 80.0% |
| Feeling healthier | 70.6% | 60.0% |
| Putting on/losing weight - whichever is healthier | 41.2% | 33.0% |
| Understanding and acknowledgement of root causes/issues | 58.8% | 59.0% |
| Less worried about being homeless | 23.5% | 44.0% |
| Improved mental wellbeing | 93.8% | 99.0% |
| Better able to cope with crisis | 99.0% | 99.0% |
| Improved school performance of children | 47.0% | 47.0% |
| Feel less isolated | 52.9% | 57.0% |
| | | |
| FOODSERVICE statistics | | |
| Food collected – total (kg) | 157078.76 | 142180.4 |
| of which, food collected directly from the food industry (kg) | 83376.24 | 115400.6 |
| of which, food collected from the general public (kg) | 29424.18 | 26222.5 |
| of which, food grown or processed into meals by RISE (kg) | 2113.92 | 557.3 |
| Of which, fresh 5-a-day foods - fruit and vegetables (kg) | 68802.64 | 79059.2 |
| | | |
| Food distributed – total (kg) | 173766.11 | 131232.50 |
| of which, given to Rebuilding Lives Support Programme clients (kg) | 155381.20 | 90435.80 |
| of which, given to other charities - free of any charge (kg) | 15057.71 | 30903.50 |
| of which, food unfit to be used | 3327.20 | 9893.10 |



© The Matthew Tree Project 2021

# FINANCIAL STATEMENTS FOR THE YEAR ENDED 31 DECEMBER 2020

## OFFICERS AND PROFESSIONAL ADVISORS

TRUSTEES who have served during the year and up until the date of signing the report are:
Nigel Goodway
Jonathan Evans
Roger Wooldridge
@UK Plc (secretary)

TRUSTEES who were either appointed or resigned during the period and prior to signing these accounts:
Lorraine Patch – resigned 29 May 2021
Colin Sainsbury – appointed 12 August 2021

### INDEPENDENT MANAGEMENT ADVISOR

Anstey Barton Consulting
Huntsham
Tiverton
EX16 7NG

### INDEPENDENT HR ADVISOR

BrightHR
Peninsula Consulting
Victoria Place
Manchester M4 4FB

### FINANCIAL OFFICER

Sue McQuaid
Libra Accounting Services Ltd
54 Petherton Gardens
Hengrove, Bristol BS14 9BS

### BANKERS

HSBC Bank plc
431 Oxford Street
London
W1C 2DA

### INSURERS

Zurich Insurance plc
The Zurich Centre
3000 Parkway
Whiteley, Fareham PO15 7JZ

### PRINCIPAL OFFICE OF THE CHARITY

3rd Floor
1 Temple Way
Bristol
BS2 0BY

### REGISTERED OFFICE OF THE CHARITY

3rd Floor
207 Regent Street
London
W1B 3HH

### INDEPENDENT ACCOUNTS EXAMINER

Neil M Kingston FCA
Burton Sweet Limited
The Clock Tower, 5 Farleigh Court
Old Weston Road, Flax Bourton
Bristol BS48 1UR

### IMPACT MONITORING ADVISORS

Clarity CIC
The Old Bakery, Old Road
Harbertonford
Totnes TQ9 7TA

### apricot™ CASE MANAGEMENT SOFTWARE

Fully integrated bespoke case management and impact monitoring system designed on the APRICOT® software platform and underpinned by The Matthew Tree Project 'Theory of Change Framework'.

## REPORT OF THE TRUSTEES

The Board of Trustees present their annual report and the independently examined financial statements for the year ended 31 December 2020. These are prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the Charity's Trust Deed, 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) and Financial Reporting Standard 102 and the Companies Act 2006.

## STRUCTURE, GOVERNANCE AND MANAGEMENT

The Mathew Tree Project was established in July 2010 and is a registered charity, number 1146401. The charitable company is registered as a company limited by guarantee, as defined by the Companies Act 2006. The governing document is its Memorandum and Articles of Association, and it is a registered company (number 7324296).

The Charitable Company has no share capital, but under the terms of the Memorandum of Association, every member is liable to contribute a sum not exceeding £10 in the event of the Charitable Company being wound up.

The principal objects of the Charitable Company are:

"To relieve financial hardship amongst all peoples of all ages in the local communities in accordance with a Christian ethos."

## RISK MANAGEMENT

The Trustees confirm that they regularly review the significant risks facing the Trust and have systems and procedures in place to mitigate those risks. The risk policy has adopted a risk mapping methodology that is applied to each identified risk, assessing the likelihood of it occurring and the severity of the impact of occurrence on the Trust.

## OBJECTIVES AND ACTIVITIES FOR THE PUBLIC BENEFIT

The Trustees have complied with their duty to have due regard to the guidance on public benefit published by the Charity Commission when exercising their powers and duties.

## RESULTS FOR THE YEAR

The charity received income for the year of £989,302, (2019: £877,642), including £449,225 (2019: £523,224) of food gifts for distribution to those in need. Expenditure for the year was £845,530 (2019: £794,946).

## RESERVES POLICY

The trustees aim to hold no more than £100,000 of free reserves. Any funds over this level are reinvested in the development of client services. At the end of the year, free reserves were £71,125, and at the end of 2019 free reserves were £9,463.

## GOING CONCERN

After making enquiries, the Trustees have a reasonable expectation that the Trust has adequate resources to continue its objectives and activities for the public benefit for the foreseeable future. Accordingly, they continue to adopt the going concern basis in preparing the annual report and financial statements.

Further details regarding the adoption of the going concern basis are in note 1 'Accounting Policies' in the financial statements.

**Covid-19 Pandemic**

Covid-19 was first reported during the period covered by this annual report. The World Health Organization declared the outbreak a Public Health Emergency of International Concern on 30 January 2020, and a pandemic on 11 March 2020.

As a result, 2020 has been a brutal year for so many people because of the worldwide pandemic which has claimed the lives of 138,852 people in the UK (people who died within 28 days of testing positive for Covid-19) as of 18 October 2021.

The crisis support services provided by The Matthew Tree Project has meant that the charity is regarded as a provider of key frontline emergency support services. Covid-19 has sharply increased demand on the charity: open case load rose from 320 people to 671 people between March 2020 and February 2021; and has significantly increased operational costs. Thankfully, additional Covid-19 specific funding was made available and TMTP has been successful in securing the funds and additional food supplies required to meet the growth in client numbers.

Covid-19 has placed un-imaginable pressure on the resources and processes of the charity – at entry point by way of food supplies and further down the line in addressing the underlying causes of the crisis. Due to Covid-19, the way services are delivered has been completely repurposed:

**Support Centres / Community Hubs Temporarily Closed**
All five 'Rebuilding Lives Community Hubs' closed for the safety of the clients, many of whom are vulnerable, and our volunteers and staff.

**City-wide Home Delivery Foodservice Launched**
Weekly home delivery foodservice introduced. By the end of December 2020, The Matthew Tree Project were distributing the food equivalent of circa. 9000 meals per week – up from 6000 (Feb, 2020).

**New Crisis Support Phone Line Launched**
A (lifeline) weekly crisis support phone service has been introduced which has enabled the programme to continue to help people address their crisis situation and rebuild a better future.

## RELATED PARTIES

The Matthew Tree Project wholly own Rise Social Enterprise Limited, company limited by shares number 10740064.

## AWARDS

The Matthew Tree Project were awarded the following accolades:

Best Practice Representative 2020; Health & Social Work, Support, Wellbeing, Awareness

### A Message from Lord Pickles and Lord Blunkett

The ability to listen and learn from one another has always been vital in parliament, in business and in most aspects of daily life. But at this particular moment in time, as national and global events continue to reiterate, it is uncommonly crucial that we forge new channels of communication and reinforce existing ones. The following article from The Matthew Tree Project is an attempt to do just that. We would welcome your thoughts on this or any other Parliamentary Review article.

Rt Hon The Lord David Blunkett

Rt Hon The Lord Eric Pickles

The article referred to in the aforementioned message from Lord Blunkett and Lord Pickles is on pages 17-19 of the full publication which can be found via the following link.

https://www.theparliamentaryreview.co.uk/editions/2020/health-social-work/health-social-work-support-wellbeing-awareness

## TRUSTEES' RESPONSIBILITIES IN RELATION TO THE FINANCIAL STATEMENTS

The trustees (who are also directors of The Matthew Tree Project for the purposes of company law) are responsible for preparing the Trustees' Report (incorporating the strategic report and directors' report) and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Accepted Accounting Practice).

Company law requires the trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the income and expenditure, of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that 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 financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Approved by the Trustees on 29 October, 2021 and signed on their behalf by:

Colin Sainsbury – Trustee Chair

# INDEPENDENT EXAMINERS REPORT

**Independent examiner's report to the trustees of The Matthew Tree Project**
I report to the charity trustees on my examination of the accounts of the Company for the year ended 31 December 2020.

.

**Responsibilities and basis of report**
As the charity's trustees of the Company (and also its directors for the purposes of company law) you are responsible for the preparation of the accounts in accordance with the requirements of the Companies Act 2006 ('the 2006 Act').

Having satisfied myself that the accounts of the Company are not required to be audited under Part 16 of the 2006 Act and are eligible for independent examination, I report in respect of my examination of your charity's accounts as carried out under section 145 of the Charities Act 2011 ('the 2011 Act'). In carrying out my examination I have followed the Directions given by the Charity Commission under section 145(5) (b) of the 2011 Act.

**Independent examiner's statement**
Since the Company's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm that I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales, which is one of the listed bodies.

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

1. accounting records were not kept in respect of the Company as required by section 386 of the 2006 Act; or
2. the accounts do not accord with those records; or
3. the accounts do not comply with the accounting requirements of section 396 of the 2006 Act 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; or
4. the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

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

Neil M Kingston FCA
Burton Sweet Limited
The Clock Tower, 5 Farleigh Court
Old Weston Road, Flax Bourton
Bristol BS48 1UR

October 29, 2021

# THE MATTHEW TREE PROJECT

## STATEMENT OF FINANCIAL ACTIVITIES (Including Income and Expenditure account)

## YEAR ENDED 31 DECEMBER 2020

| | Note | General Funds £ | Restricted Funds £ | Total Funds 2020 £ | Total Funds 2019 £ |
|---|---|---|---|---|---|
| ***Income from:*** | | | | | |
| Donations | | 503,976 | - | 503,976 | 584,157 |
| Grants receivable | | 182,386 | 298,779 | 481,165 | 245,424 |
| Charitable activities | | - | - | - | 45,000 |
| Other sources | | 4,161 | - | 4,161 | 3,061 |
| **Total income** | | 690,523 | 298,779 | 989,302 | 877,642 |
| ***Expenditure on:*** | | | | | |
| Raising funds | | 18,208 | - | 18,208 | 21,591 |
| Charitable activities | **2** | 567,909 | 259,413 | 827,322 | 773,355 |
| **Total expenditure** | | 586,117 | 259,413 | 845,530 | 794,946 |
| **Net income/(expeniture) and net movement in funds** | **3** | 104,406 | 39,366 | 143,772 | 82,696 |
| **Total funds at 1 January 2020** | **10** | 73,968 | 164,507 | 238,475 | 155,779 |
| **Total Funds at 31 December 2020** | **10** | 178,374 | 203,873 | 382,247 | 238,475 |

There are no recognised gains or losses other than the results for the year as set out above.

All activities are classed as continuing.
Fund-accounting comparative transactions are shown in note 4

**The notes on pages 59 to 64 form part of these financial statements**

# THE MATTHEW TREE PROJECT

## BALANCE SHEET

## AS AT 31 DECEMBER 2020

Company number: 07324296

| | Notes | 2020 | 2019 |
|---|---|---|---|
| | | £ | £ |
| **Fixed assets** | | | |
| Tangible fixed assets | **6** | 42,744 | 44,500 |
| Investments | **7** | 1 | 1 |
| **Current assets** | | | |
| Debtors | **8** | 1,250 | 1,250 |
| Food stocks | | 32,918 | 66,352 |
| Rise Loan account | | 163,886 | 97,228 |
| Cash at bank | | 149,111 | 41,855 |
| | | 347,165 | 206,685 |
| **Creditors: amounts falling due within one year** | **9** | (7,663) | (12,711) |
| **Net current assets** | | 339,502 | 193,974 |
| **Total net assets** | | 382,247 | 238,475 |
| **Unrestricted funds** | | | |
| Unrestricted funds | **11** | 178,374 | 73,968 |
| Restricted funds | **11** | 203,873 | 164,507 |
| **Total funds** | | 382,247 | 238,475 |

For the period ending 31 December 2020 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

i) The members have not required the company to obtain an audit of its accounts for the year in question in accordance with section 476,

ii) The directors acknowledge their responsibilities for complying with the requirements of the Act with respect to accounting records and the preparation of accounts

These accounts have been prepared in accordance with the special provisions for small companies under Part 15 of the Companies Act 2006.

These financial statements were approved by the trustees on 29 October, 2021 and are signed on their behalf by:

Colin Sainsbury, Trustee Chair

**The notes on pages 59 to 64 form part of these financial statements**

# THE MATTHEW TREE PROJECT

## CASH FLOW STATEMENT

## AS AT 31 DECEMBER 2020

| | Note | 2020 | 2019 |
|---|---|---|---|
| **Net cash inflow from operating activities** | A | 112,127 | 40,500 |
| **Non-operational cash flows:** | | | |
| **Investing activities** | | | |
| Investment income | | 2 | 2 |
| Payments for tangible fixed assets | | (4,873) | (44,203) |
| **Net cash inflow/(outflow) for the year** | B | 107,256 | (3,701) |

**Cashflow Restrictions**

Charity law prohibits the use of net cash inflows on any endowed or other restricted fund to offset net cash outflows on any fund outside its own objects, except on special authority. In practice, this restriction has not had any effect on cash flows for the year.

**A Reconciliation of net movement in funds to net cash inflow from operating activities**

| | 2020 | 2019 |
|---|---|---|
| | **£** | **£** |
| Statement of Financial Activities: Net movement in funds | 143,772 | 82,696 |
| Investment income | (2) | (2) |
| Depreciation | 6,629 | 20,833 |
| (Decrease) / increase in creditors: current liabilities | (5,048) | 6,272 |
| (Increase) in debtors | (66,658) | (29,010) |
| (Increase) in stock | 33,434 | (40,289) |
| **Net cash (outflow)/inflow from operating activities** | 112,127 | 40,500 |

**B Analysis of changes in cash during the year**

| | 2020 | 2019 | Change |
|---|---|---|---|
| | **£** | **£** | **£** |
| Cash at bank and in hand | 149,111 | 41,855 | 107,256 |

| | 2019 | 2018 | Change |
|---|---|---|---|
| | **£** | **£** | **£** |
| Cash at bank and in hand | 41,855 | 45,556 | (3,701) |

**C Analysis of changes in net debt**

| | At 01-Jan-2020 | Cash flows | Non cash flows | At 31-Dec-2020 |
|---|---|---|---|---|
| | **£** | **£** | **£** | **£** |
| **Cash and cash equivalents** | | | | |
| Cash | 41,855 | 107,256 | - | 149,111 |
| **Total** | 41,855 | 107,256 | - | 149,111 |

| | At 01-Jan-2019 | Cash flows | Non cash flows | At 31-Dec-2019 |
|---|---|---|---|---|
| | **£** | **£** | **£** | **£** |
| **Cash and cash equivalents** | | | | |
| Cash | 45,556 | (3,701) | - | 41,855 |
| **Total** | 45,556 | (3,701) | - | 41,855 |

**The notes on pages 59 to 64 form part of these financial statements**

## 1 Accounting Policies

a)The financial statements have been prepared in accordance with the Charities Act 2011, the Companies Act 2006, Financal Reporting Standard FRS102, and the Charities' Statement of Recommended Practice (FRS102). Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy note(s).

The charity meets the definition of a public benefit entity under FRS102.
The trustees consider that the charity is able to continue as a going concern for at least the next twelve months. Please refer to the trustees' consideration in the Trustees' Report.

b) Income from donations is included when it is receivable, except as follows:

I. When donors specify that donations given to the charity must be used in future accounting periods, the income is deferred until those periods;

II. When donors impose conditions, which have to be fulfilled before the charity becomes entitled to use such income, the income is deferred until the pre-conditions have been met.

c) Gifts in kind includes donated services and facilities which are recognised at a reasonable estimate of their gross value to the Charity. An equivalent amount has been included as expenditure under the appropriate heading in the Statement of Financial Activities.

d) Expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure includes attributable VAT, which cannot be recovered.

e) Grants payable are charged in the year when the offer is conveyed to the recipient except in those cases where the offer is conditional, such grants being recognised when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the year-end are noted as a commitment, but not accrued as expenditure.

f) Tangible fixed assets costing more than £1,000 are capitalised and included at cost including any incidental expenses of acquisition.

Depreciation is calculated so as to write off the cost of an asset, less its estimated residual value, over the useful economic life of that asset as follows:

| | |
|---|---|
| Equipment | 25% per annum on a reducing balance basis |
| Office equipment, furinture & fixtures | 25% per annum on a reducing balance basis |
| Motor vehicles | 25% per annum on a reducing balance basis |

g) Cash at bank includes cash and short-term highly liquid investments with a notice of withdrawal period of three months or less.

h) Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

i) Creditors are recognised where the charity has a present obligation resulting from a past event event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

j) Unrestricted funds can be used in accordance with the charitable objects at the discretion of the trustees.

l) Restricted funds can only be used for particular restricted purposes within the objects of the charity. Restrictions arise when specified by the donor or when funds are raised for particular restricted purposes. Expenditure which meets these criteria is charged to the fund, together with a fair allocation of management and support costs. Further explanation of the nature and purpose of each fund is included in the notes to the financial statements.

## 2 Costs of activities in furtherance of charity's objectives

| | **Total Funds 2020 £** | Total Funds 2019 £ |
|---|---|---|
| *Direct costs* | | |
| Food costs | 551,843 | 483,783 |
| Premises | 7,925 | 12,923 |
| Salaries | 111,792 | 124,515 |
| Strategic partner grants | 30,000 | 3,000 |
| Hardship grants | 250 | - |
| | 701,810 | 624,221 |
| *Support costs* | | |
| Salaries | 83,259 | 91,297 |
| Employer's pension costs | 2,565 | 2,602 |
| Other staff costs | 581 | 1,367 |
| Printing and stationery | 9,821 | 9,685 |
| Meeting costs | 565 | 1,435 |
| IT costs | 7,573 | 424 |
| Evaluation and consultancy costs | - | 9,113 |
| Motor and travel expenses | 5,296 | 3,642 |
| Insurance | - | 4,491 |
| Depreciation | 6,630 | 20,833 |
| Miscellaneous expenses | 5,519 | 2,049 |
| *Governance costs* | | |
| Legal and professional fees | 1,664 | - |
| Independent examiner's fee | - | 180 |
| Accountancy | 2,039 | 2,016 |
| | 125,512 | 149,134 |
| | 827,322 | 773,355 |

## 3 Net income/expenditure is stated after charging:

| | **2020 £** | 2019 £ |
|---|---|---|
| Depreciation | 6,630 | 20,833 |
| Independent Examiner's fee | 1,740 | 180 |

## 4 Fund-accounting comparative figures

| | General Funds £ | Restricted Funds £ | Total Funds 2019 £ |
|---|---|---|---|
| ***Income from:*** | | | |
| Donations | 584,157 | - | 584,157 |
| Grants receivable | 81,268 | 164,156 | 245,424 |
| Charitable activities | - | 45,000 | 45,000 |
| Other sources | 3,061 | - | 3,061 |
| **Total income** | 668,486 | 209,156 | 877,642 |
| ***Expenditure on:*** | | | |
| Raising funds | 21,591 | - | 21,591 |
| Charitable activities | 605,583 | 167,772 | 773,355 |
| **Total expenditure** | 627,174 | 167,772 | 794,946 |
| **Net income/(expeniture) and net movement in funds** | 41,312 | 41,384 | 82,696 |
| **Total funds at 1 January** | 32,656 | 123,123 | 155,779 |
| **Total Funds at 31 December** | 73,968 | 164,507 | 238,475 |

## 5 Salaries

| | 2020 £ | 2019 £ |
|---|---|---|
| Salaries | 181,004 | 201,765 |
| National Insurance | 14,047 | 14,047 |
| Employer's pension contributions | 2,564 | 2,601 |
| | 197,615 | 218,413 |

The average weekly number of employees during the year was 9, (2019:9)

No employee received more than £60,000 during the year.

The trustees consider the key management personnel to be the Chief Executive Officer. Total employee benefits paid to key management personnel (including employer's national insurance contributions and pension costs) were £59,799 (2019: £56,767).

No trustees received remuneration or other benefits from the company during the year (2019: £Nil).

## 6 Tangible Fixed Assets

| | Equipment | Office equipment, fixtures & fittings | Motor vehicles | Total |
|---|---|---|---|---|
| | £ | £ | £ | £ |
| **Cost** | | | | |
| At 1 January 2020 | 65,753 | 21,478 | 13,297 | 100,528 |
| Additions | - | 4,873 | - | 4,873 |
| At 31 December 2020 | 65,753 | 26,351 | 13,297 | 105,401 |
| **Depreciation** | | | | |
| At 1 January 2020 | 30,513 | 15,172 | 10,343 | 56,028 |
| Charge for the year | 6,350 | (452) | 731 | 6,629 |
| At 31 December 2020 | 36,863 | 14,720 | 11,074 | 62,657 |
| **Net book value** | | | | |
| **At 31 December 2020** | **28,890** | **11,631** | **2,223** | **42,744** |
| At 31 December 2019 | 35,240 | 6,306 | 2,954 | 44,500 |

## 7 Investments

| | 2020 | 2019 |
|---|---|---|
| | £ | £ |
| 100% holding in subsidiary | 1 | 1 |

RISE Social Enterprise Ltd (company number 10740064) is a subsidiary of the charity. At the end of the year, the company owed The Matthew Tree Project £163,886 (2019: £97,228) for equipment and other services.

## 8 Debtors

| | 2020 | 2019 |
|---|---|---|
| | £ | £ |
| Rental deposits | 1,250 | 1,250 |
| | 1,250 | 1,250 |

## 9 Creditors Falling Due Within One Year

| | 2020 | 2019 |
|---|---|---|
| | £ | £ |
| Creditors | 982 | 1 |
| PAYE and NI, salaries | 6,681 | 12,710 |
| | 7,663 | 12,711 |

## 10 Movement in funds

| | At 1 January 2020 | Income | Expenditure | Transfers | At 31 December 2020 |
|---|---|---|---|---|---|
| | £ | £ | £ | £ | £ |
| **Restricted funds** | | | | | |
| Key personnel salaries | 34,967 | 53,800 | (44,833) | - | 43,934 |
| Food Distribution Operations | 61,675 | 30,000 | (15,000) | - | 76,675 |
| Rebuilding Lives | 30,347 | 82,017 | (97,017) | - | 15,347 |
| RISE Social Enterprise | 5,000 | 20,463 | (463) | - | 25,000 |
| Money Smart Work Wise | 5,000 | - | (5,000) | - | - |
| Mobile Foodstore | 15,018 | - | (15,018) | - | - |
| Data Analysis Officer | 12,500 | 25,000 | (14,583) | - | 22,917 |
| Community Kitchen | - | 20,000 | - | - | 20,000 |
| Food for clients during covid | - | 67,499 | (67,499) | - | - |
| | 164,507 | 298,779 | (259,413) | - | 203,873 |
| **Unrestricted general funds** | 9,463 | 690,523 | (586,117) | - | 113,869 |
| **Designated funds** | | | | | |
| Food Stock funds | 64,505 | - | - | - | 64,505 |
| **Total funds** | 238,475 | 989,302 | (845,530) | - | 382,247 |

**Movement in funds - prior year**

| | At 1 January 2019 | Income | Expenditure | Transfers | At 31 December 2019 |
|---|---|---|---|---|---|
| | £ | £ | £ | £ | £ |
| **Restricted funds** | | | | | |
| Key personnel salaries | 17,333 | 52,900 | (35,266) | - | 34,967 |
| Food Distribution Operations | 44,175 | 30,000 | (12,500) | - | 61,675 |
| Rebuilding Lives | 30,347 | 101,256 | (101,256) | - | 30,347 |
| RISE Social Enterprise | 5,000 | - | - | - | 5,000 |
| Money Smart Work Wise | 5,000 | - | - | - | 5,000 |
| Mobile Foodstore | 15,018 | - | - | - | 15,018 |
| Data Analysis Officer | 6,250 | 25,000 | (18,750) | - | 12,500 |
| | 123,123 | 209,156 | (167,772) | - | 164,507 |
| **Unrestricted general funds** | 8,439 | 145,262 | (144,238) | - | 9,463 |
| **Designated fund** | | | | | |
| Food Stock funds | 24,217 | 523,224 | (482,936) | - | 64,505 |
| **Total funds** | 155,779 | 877,642 | (794,946) | - | 238,475 |

**10 Movement in funds *(continued)***

Unrestricted funds are available to be used at the discretion of the trustees in line with the charity's purposes.

Designated funds - The Food Stock fund represents gifts of food received during the year and food distributed to those in need. The balance at the end of the year is the value of food stocks held by the charity.
Restricted funds
The Key personnel salaries fund includes grants received to fund the Chief Executive Officer's salary
The Food Distribution Operations fund includes grants received to fund the supervisor of this work
The Rebuilding Lives fund includes grants received towarsds running the charity's Rebuilding Lives Crisis Support Programme.
Rise Social Enterprise fund - funds were received for setup costs and for a kitchen.
Money Smart Work Wise - funds were received to enable work on this project
Mobile Foodstore funds were received to help with the purchase of a lorry to set up a mobile store.
The Data Analysis fund enables the charity to see where our work is needed most and evaluate the results of its operations.
The Community Kitchen fund is made up of the OVO Energy grant.

**11 Analysis of Net Assets Between Funds**

| | Tangible Fixed Assets | Other Net Assets | Total Funds |
|---|---|---|---|
| | £ | £ | £ |
| Restricted funds | - | 203,873 | 203,873 |
| Unrestricted general funds | 42,745 | 135,629 | 178,374 |
| | 42,745 | 339,502 | 382,247 |

**Prior year**

| | Tangible Fixed Assets | Other Net Assets | Total Funds |
|---|---|---|---|
| | £ | £ | £ |
| Restricted funds | - | 164,507 | 164,507 |
| Unrestricted general funds | 44,501 | 29,467 | 73,968 |
| | 44,501 | 193,974 | 238,475 |

**12 Related parties**

Jonathan Evans (trustee) is a director of Arthur David Limited, to whom the charity paid £47,997 (2019: £nil) for wholesale food supplies

No trustees received or waived expense payments during either the current, or previous year.

# Contact Us

INFO@THE-MATTHEW-TREE-PROJECT.ORG

0117 966 8071

The Matthew Tree Project
3rd Floor, 1 Temple Way
Bristol, BS2 0BY

www.facebook.com/thematthewtreeproject/
www.facebook.com/RiseSocialEnterprise/

WWW.THEMATTHEWTREEPROJECT.ORG



© The Matthew Tree Project 2021