



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From: 1 January 2020 to 31st December 2020

Charity name: OneZoom

Charity registration number: 1163559

Objectives and Activities

| | SORP reference | |
|--|--------------------|---|
| Summary of the purposes of the charity as set out in its governing document | Para 1.17 | To advance the education of the public in subjects of evolution, biodiversity and conservation of the variety of life on earth |
| Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts. | Para 1.17 and 1.19 | Our main activity is building and maintaining a scientifically accurate, educational, and visually appealing record of the tree of life that is easily accessible to the public online. We also collaborate with other organisations to support outreach exhibitions and events that benefit from use of our tree of life explorer. |
| Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit | Para 1.18 | The Trustees have had due regard to the guidance issued by the Charity Commission on public benefit |

Additional information (optional)

You may choose to include further statements where relevant about:

| | SORP reference | |
|--|----------------|---|
| Policy on grant making | Para 1.38 | Grant making is not part of our core activities and consequently we do not have a formal policy on grants and deal with potential grant making opportunities on a case-by-case basis. |
| Policy on social investment including program related investment | Para 1.38 | This does not form part of our activities. |
| Contribution made by volunteers | Para 1.38 | The trustees themselves did the majority of volunteer work done for OneZoom. This is because the trustees have the relevant knowledge and experience in biology computing, education and science outreach. We do not log the total hours contributed by volunteers but have estimated that the total comfortably exceeds 500 hours during the reporting period. |

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| Other | | |
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Achievements and Performance

| | SORP reference | |
|---|----------------|---|
| Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole. | Para 1.20 | <p>During the reporting period we made substantial improvements to our software and science outreach website. Specifically, we completed a substantial redesign of the landing page of our website. This had been identified as a key shortcoming of our previous versions and was mentioned in the previous report. The landing page now allows users to search the tree of life and includes a lot more interpretation about the tree of life and what the site offers. The front page features a new visual design and user interface that was built with advice from professional designers. We have paid specific attention to signposting different kinds of users (members of the public, educators and scientists) to different content that could be interesting or useful to them.</p> <p>Separately from the landing page update, we have released new public APIs giving access to our content for use by third party research and educational projects. An example of such a project that has since been developed with some support from OneZoom is https://phyloquiz.com. These APIs go beyond those mentioned in the previous reporting period because they have additional functionality and are properly documented and open to all on the website.</p> <p>Key people from OneZoom have, during this reporting period, submitted a scientific publication on the advances that have been involved in getting the project to this stage. A pre print can be seen here https://www.biorxiv.org/content/10.1101/2020.10.14.323055v1 The manuscript is undergoing revisions for publication at the time of writing.</p> <p>We continued to receive financial support from the public via our leaf sponsorship funding model during the reporting period. Whilst early supporters should in theory be asked to renew their sponsorship during this reporting period we deferred requesting this. Firstly because we didn't want to request further funding from the public during the COVID pandemic crisis on something that was not urgent. Secondly, the work required from us to develop a good user experience for renewing sponsorships would be substantive and it was not practical for the trustee volunteers to undertake this in addition to their other commitments during this reporting period.</p> <p>We have noted web traffic during the reporting period from 124,937 users with 13,310 of these spending a meaningful amount of time on the site of over 3 minutes; 2,759 users spent over 30 minutes exploring the site. These figures are less than the previous reporting period but we believe they</p> |

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| | | <p>are underestimates due to an error in the way traffic has been tracked on the site since the launch of our new front page. This error will be fixed during the next reporting period. Approximately 9.5% of users were based in the UK, 54% in the US and the remainder spread across 188 other countries.</p> |
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Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
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| Achievements against objectives set | Para 1.41 | Two key objectives were set for the charity since its foundation, first to achieve sustainability through the leaf sponsorship scheme, and second to enhance our software enabling it to display the complete tree of life for educational purposes. These objectives were met in the 2017 reporting period. Objectives since then have been to maintain what we have already set up and to increase the impact by encouraging broader use. During the present reporting period we have continued to maintain our resource through a difficult time. In the next reporting period we plan to focus on sponsorship renewals and publication of our scientific work. |
| Performance of fundraising activities against objectives set | Para 1.41 | We have not set formal objectives for fundraising because the leaf sponsorship model comfortably pays for running costs payable to third parties. Where third parties approach us for collaboration normally work with them to budget for the necessary developments to our codebase and assist those third parties in getting funding, which is paid to trusted professionals to improve our software for public use. The trustees regard this strategy as lower risk for the charity whilst still effectively enabling us to meet our objectives. |
| Investment performance against objectives | Para 1.41 | We have no investments because the funds that would be available for this are negligible in size. |
| Other | | Whilst the funds we have raised are relatively small, we have been able to achieve a lot with those funds. We continue to have ambitions for the future to further increase our audience, add significant new features and reach out to other charitable organisations with complementary aims. |

Financial Review

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| Review of the charity's financial position at the end of the period | Para 1.21 | The CIO had unrestricted funds of £5162.75 at 31 December 2020, represented by bank balances. During the reporting period we reclaimed £2807.74 in Gift Aid on all eligible donations made since the launch of our sponsorship scheme. A range of documented costs including running the website and renewing the virtual address during this reporting period were paid by a trustee and refunded during the next reporting period. |
| Statement explaining the policy for holding reserves stating why they are held | Para 1.22 | Reserves are required to meet future obligations and to support the growth of the CIO's activities. This calendar year we have built up reserves for planned development work in the 2019 calendar year |
| Amount of reserves held | Para 1.22 | £1,000 |
| Reasons for holding zero reserves | Para 1.22 | N/A |
| Details of fund materially in deficit | Para 1.24 | N/A |
| Explanation of any uncertainties about the charity continuing as a going concern | Para 1.23 | The CIO is dependent on obtaining third party support to develop and improve its products for public benefit. Thanks to the current efforts of volunteers the CIO can continue its core operations with a relatively small amount of ongoing funding. Total annual running costs remain under £1000 so we have held reserves to run for a further 12 months. |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|---|
| The charity's principal sources of funds (including any fundraising) | Para 1.47 | All of our funding revenue has come from donations from individuals through our 'sponsor a leaf' campaign, which enables donors to be acknowledged on a unique leaf of our tree of life display as recognition for their donation. |
| Investment policy and objectives including any social investment policy adopted | Para 1.46 | We do not invest our funds as the amount is too small to justify the necessary research into ethical investments that would be compatible with our charitable aims. |
| A description of the principal risks facing the charity | Para 1.46 | The potential risks to the charity are loss of volunteer time, and loss of funds. Volunteer time is the more valuable at present, particularly that from software developers who perform skilled work that would be very expensive to replace with contractors or paid professionals. A secondary risk is running out of funds, however the charity only requires minimal funding to pay for its essential operation of hosting the website, ongoing improvements and maintenance are |

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| | | <p>less essential though still important.</p> <p>In the short term we accept both risks. We do not provide a critical service upon which users are heavily dependent for their wellbeing: if either risk were to materialise, the worst case would be the loss of a free online resource. We have mitigated against both risks by releasing our software under a public license, which includes a failsafe. The failsafe specifies that if the charity ceases to trade, our software becomes open source, meaning that other individuals or organisations would be able to use it for free to continue our work, should there be a sufficient demand. In the next reporting period we hope to release a Docker image of our resource making it even easier for a third party to replicate everything we have created should we cease to operate.</p> |
| Other | | |

Structure, Governance and Management

| | | |
|---|-----------|--|
| Description of charity's trusts: | | |
| Type of governing document | Para 1.25 | Foundation Constitution |
| How is the charity constituted? | Para 1.25 | CIO - Foundation Registered 14 Sep 2015 |
| Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees | Para 1.25 | <p>Apart from the founding trustees, every subsequent trustee must be appointed by a resolution passed at a properly convened meeting of the Board.</p> <p>In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.</p> |

Additional information (optional)

You may choose to include further statements where relevant about:

| | | |
|---|-----------|--|
| Policies and procedures adopted for the induction and training of trustees | Para 1.51 | We have not yet inducted new trustees since charity formation. One of the founding trustees and current chair has attended an extensive trustee leadership programme and an emerging chairs program run by Cause4. Another founding trustee has experience from being a trustee of another unrelated UK charity. |
| The charity's organisational structure and any wider network with which the charity works | Para 1.51 | |
| Relationship with any related parties | Para 1.51 | No relevant related-party relationships to report for this period |
| Other | | |

Reference and Administrative details

| | |
|-----------------------------|---------|
| Charity name | OneZoom |
| Other name the charity uses | |
| Registered charity number | 1163559 |

| | |
|-----------------------------|---|
| Charity's principal address | OneZoom Office 7 35-37 Ludgate Hill London EC4M 7JN |
| | |

Names of the charity trustees who manage the charity

| | Trustee name | Office (if any) | Dates acted if not for whole year | Name of person (or body) entitled to appoint trustee (if any) |
|----|--------------------|-----------------|-----------------------------------|---|
| 1 | Dr Yan Wong | | | |
| 2 | Dr James Rosindell | | | |
| 3 | Dr Luke Harmon | | | |
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| 20 | | | | |

Corporate trustees – names of the directors at the date the report was approved

[illegible]

Name of trustees holding title to property belonging to the charity

[illegible]

Funds held as custodian trustees on behalf of others

| | |
|---|--|
| Description of the assets held in this capacity | |
| Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects | |
| Details of arrangements for safe custody and segregation of such assets from the charity's own assets | |

Additional information (optional)

Names and addresses of advisers (Optional information)

| Type of adviser | Name | Address |
|-----------------|------|---------|
| | | |
| | | |
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Name of chief executive or names of senior staff members (Optional information)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

| | | |
|-------------------------------------|---|--|
| Signature(s) |  | |
| Full name(s) | Dr James Rosindell | |
| Position (eg Secretary, Chair, etc) | Chair | |
| Date | 12-Oct-2021 | |



Receipts and payments accounts

CC16a

For the period
from

01-Jan-20

To

31-Dec-20

Section A Receipts and payments

| | Unrestricted funds to the nearest £ | Restricted funds to the nearest £ | Endowment funds to the nearest £ | Total funds to the nearest £ | Last year to the nearest £ |
|---|--|--------------------------------------|-------------------------------------|---------------------------------|-------------------------------|
| A1 Receipts | | | | | |
| Sponsorship | 1,838 | - | - | 1,838 | 2,695 |
| Payment for API service | - | - | - | - | 1,500 |
| interest | - | - | - | - | 4 |
| Paypal giving fund | 31 | - | - | 31 | - |
| Gift aid reclaim on all previous eligible donations | 2,808 | - | - | 2,808 | - |
| Other donations | 76 | - | - | 76 | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total (Gross income for AR) | 4,752 | - | - | 4,752 | 4,199 |
| A2 Asset and investment sales, (see table). | | | | | |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total | - | - | - | - | - |
| Total receipts | 4,752 | - | - | 4,752 | 4,199 |
| A3 Payments | | | | | |
| Bank charges | 4 | - | - | 4 | 28 |
| Website costs | - | - | - | - | 666 |
| payment to collaborating organisation | - | - | - | - | 15 |
| Software development | 1,200 | - | - | 1,200 | 7,845 |
| Insurance | 287 | - | - | 287 | 287 |
| paypal charges | - | - | - | - | 71 |
| graphic design | 694 | - | - | 694 | - |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total | 2,185 | - | - | 2,185 | 8,912 |
| A4 Asset and investment purchases, (see table) | | | | | |
| | - | - | - | - | - |
| | - | - | - | - | - |
| Sub total | - | - | - | - | - |
| Total payments | 2,185 | - | - | 2,185 | 8,912 |
| Net of receipts/(payments) | 2,567 | - | - | 2,567 | - 4,713 |
| A5 Transfers between funds | - | - | - | - | - |
| A6 Cash funds last year end | 2,596 | - | - | 2,596 | 7,309 |
| Cash funds this year end | 5,163 | - | - | 5,163 | 2,596 |

Section B Statement of assets and liabilities at the end of the period

| Categories | Details | Unrestricted funds to nearest £ | Restricted funds to nearest £ | Endowment funds to nearest £ |
|--|-------------------------|------------------------------------|----------------------------------|---------------------------------|
| B1 Cash funds | PayPal | 794 | - | - |
| | Tridos Account | 4,369 | - | - |
| | | - | - | - |
| | Total cash funds | 5,163 | - | - |
| (agree balances with receipts and payments account(s)) | | OK | OK | OK |
| | | Unrestricted funds | Restricted funds | Endowment funds |

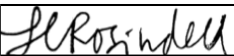
| | Details | to nearest £ | to nearest £ | to nearest £ |
|---------------------------------|---------|--------------|--------------|--------------|
| B2 Other monetary assets | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |
| | | - | - | - |

| | Details | Fund to which asset belongs | Cost (optional) | Current value (optional) |
|-----------------------------|---------|-----------------------------|-----------------|--------------------------|
| B3 Investment assets | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |

| | Details | Fund to which asset belongs | Cost (optional) | Current value (optional) |
|---|---------|-----------------------------|-----------------|--------------------------|
| B4 Assets retained for the charity's own use | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |
| | | | - | - |

| | Details | Fund to which liability relates | Amount due (optional) | When due (optional) |
|-----------------------|--|---------------------------------|-----------------------|---------------------|
| B5 Liabilities | Trustee expenses incurred for website domain and virtual address | unrestricted | 761 | - |
| | Website server costs not yet invoiced for the reporting period | unrestricted | - | - |
| | | | - | |
| | | | - | |
| | | | - | |

Signed by one or two trustees on behalf of all the trustees

| Signature | Print Name | Date of approval |
|---|----------------|------------------|
|  | Dr J Rosindell | 12/10/21 |
| | | |