



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

From: 1 January 2023 to 31<sup>st</sup> December 2023

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 CIO 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 substantive volunteer work done for OneZoom because they have the relevant knowledge and experience in biology computing, education and science outreach. During the reporting period, a loyal user of our software, David Ebbo, who had relevant experience carried out substantial software development as a volunteer. His work primarily consisted of

		refactoring the software the generates our tree data.
Other		

## 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>We continued to receive financial support from the public via our leaf sponsorship funding model during the reporting period. Over the full year we received a total of £7452.35 through this channel (accounting for PayPal charges and matched funding).</p> <p>We implemented and released a system to enable volunteers to renew their sponsorships which were intended to last for 4 years only. During the reporting period 101 leaves were renewed raising a total of £3716 in sponsorships (included as part of the total revenue from sponsorships mentioned above).</p> <p>During this reporting period we continued to make progress with the proposed work that was funded by On the EDGE Conservation. The purpose of the grant was to create educational tours around our tree of life explorer. We made excellent progress towards completion of the project during the reporting period but the project is not expected to be concluded until after the end of the reporting period. We did not release a new version of the software during the reporting period because the tours feature needed to be finished before it could provide any meaningful benefits to users of our website.</p> <p>We have noted web traffic from about 317,000 users. Based on the new tracking system data, approximately 50% were in the USA, 7% of users were based in the UK, 6% in China, 4% in Canda, 3% in Germany and the remainder spread across 221 other countries. This pattern is similar to that from the previous reporting period though with a modest 10% fall in total traffic.</p>

### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	Two key objectives were set for the CIO 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 and shown that our sustainability model of leaf sponsorship operates very successfully when enough users can be attracted to the site.
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. we hope to seek another grant after we have successfully performed the work mandated by the grant we already received.
Investment performance against objectives	Para 1.41	We have no investments because the funds that would be available for this are negligible in size. For the funds available during this reporting period, it seemed more important to spend them on our charitable purpose and not take on additional risks.
Other		This has been an excellent year for the CIO because we made progress on the tours project and began offering sponsorship renewals. The popularity of our educational software has continued to hold strong.

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	The CIO had funds of £23490 at 31 December 2023, represented by bank balances. £3830 of these funds are restricted and associated with a specific grant with deliverables.
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 kept reserves to keep the CIO operational through a 12 month period.
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	Much of the CIO's revenue up this reporting period has come from donations from individuals through the '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	The CIO does not invest funds as the amounts available are 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	<p>The potential risks to the CIO 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 CIO only requires minimal funding to pay for its essential operation of hosting the website, ongoing improvements and maintenance are less essential though still important.</p> <p>In the short term we accept both risks. We do not provide a critical service upon which</p>

		<p>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 CIO 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.</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





## 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

#### 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	6-October-2023	



## Receipts and payments accounts

CC16a

For the period  
from

01-Jan-23

To

31-Dec-23

### 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 £
<b>A1 Receipts</b>					
Sponsorship	7,207	-	-	7,207	10,498
Interest	121	-	-	121	29
Grant from On The EDGE Conservation	-	-	-	-	25,000
UK online giving foundation	453	-	-	453	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>7,781</b>	<b>-</b>	<b>-</b>	<b>7,781</b>	<b>35,527</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>7,781</b>	<b>-</b>	<b>-</b>	<b>7,781</b>	<b>35,527</b>
<b>A3 Payments</b>					
Bank charges	29	-	-	29	5
Software development	3,600	9,000	-	12,600	19,200
Insurance	450	-	-	450	409
paypal charges	208	-	-	208	383
Accounting charges	1,020	-	-	1,020	960
Brand registration renewal	420	-	-	420	-
Domain names costs	728	-	-	728	-
Virtual address costs	360	-	-	360	-
UX and graphic design	440	770	-	1,210	-
Internet hosting	1,300	-	-	1,300	-
<b>Sub total</b>	<b>8,555</b>	<b>9,770</b>	<b>-</b>	<b>18,325</b>	<b>20,957</b>
<b>A4 Asset and investment purchases, (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>8,555</b>	<b>9,770</b>	<b>-</b>	<b>18,325</b>	<b>20,957</b>
<b>Net of receipts/(payments)</b>	<b>- 774</b>	<b>- 9,770</b>	<b>-</b>	<b>- 10,544</b>	<b>14,570</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>20,434</b>	<b>13,600</b>	<b>-</b>	<b>34,034</b>	<b>19,464</b>
<b>Cash funds this year end</b>	<b>19,660</b>	<b>3,830</b>	<b>-</b>	<b>23,490</b>	<b>34,034</b>

### 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 £
<b>B1 Cash funds</b>				
	PayPal	296	-	-
	Tridos Account	19,364	3,830	-
		-	-	-
	<b>Total cash funds</b>	<b>19,660</b>	<b>3,830</b>	<b>-</b>
CCXX R1 accounts (SS)		OK	OK	OK
(agree balances with receipts and payments account(s))				

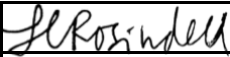
		Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B2 Other monetary assets</b>	Details			
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

		Fund to which asset belongs	Cost (optional)	Current value (optional)
<b>B3 Investment assets</b>	Details			
			-	-
			-	-
			-	-
			-	-

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

		Fund to which liability relates	Amount due (optional)	When due (optional)
<b>B5 Liabilities</b>	Details			
			-	-
			-	-
			-	-
			-	-

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

Signature	Print Name	Date of approval
	James Rosindell	10/10/2023