

THE LIVING TREE

England & Wales · Charity number 1188213

Details

Status Registered

Legal form CIO

Registered 2020-02-27

Register [View on the Charity Commission register](#)

Contact

Address c/o Nantes Solicitors
36 East Street
Bridport
Dorset
DT6 3LH

Phone 07341916976

Email mail@thelivingtree.org.uk

Website www.thelivingtree.org.uk

Activities

Objects: FOR THE PUBLIC BENEFIT TO RELIEVE THE NEEDS OF, AND PRESERVE AND PROTECT GOOD HEALTH AMONGST, PEOPLE DIAGNOSED WITH AND RECOVERING FROM TREATMENT FOR CANCER (INCLUDING THEIR FAMILY, FRIENDS AND RELATIVES WHO HAVE BEEN AFFECTED BY SUCH CANCER) IN DORSET, EAST DEVON AND SOUTH SOMERSET AND THE SURROUNDING AREAS BY PROVIDING SERVICES, ACTIVITIES AND FACILITIES FOR SUCH PERSONS, INCLUDING BUT NOT LIMITED TO THE PROVISION OF SOCIAL, COUNSELLING, EDUCATIONAL, CREATIVE, MUSICAL AND RECREATIONAL ACTIVITIES AND GUIDANCE AND INFORMATION ON THE SETTING UP AND RUNNING OF CANCER SUPPORT GROUPS.

Activities: The Living Tree offers support to anyone affected by any cancer, in West Dorset, East Devon & South Somerset, as outlined in our Constitution.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Provides Services, Provides Advocacy/advice/information, Acts As An Umbrella Or Resource Body
- **What:** The Advancement Of Health Or Saving Of Lives
- **Who:** Elderly/old People, People With Disabilities, Other Charities Or Voluntary Bodies, Other Defined Groups

Geography

- **Area of benefit:** LOCAL
- Dorset

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£25,461	£18,742	-	-
2023-12-31	£18,103	£20,599	-	-
2022-12-31	£17,794	£22,973	-	-
2021-12-31	£16,647	£10,567	-	-
2020-12-31	£40,448	£4,376	-	-

Trustees

Name	Role	Appointed
Christopher James Addis		2023-01-11
Joanna Mary Millar		2020-02-21
Marion Roberts		2025-05-14
Mark Eyton Cowling		2023-06-21
Richard John GHOST		2026-01-23
Tandy Watson		2025-05-14
Vincent Anthony O'Farrell		2020-02-21

THE LIVING TREE

England & Wales - Charity number 1188213

Accounts



The Living Tree

Living well with and beyond cancer

Trustees' Annual Report and Statement of Financial Activity for the period 1 January 2024 to 31 December 2024

Trustees

**Chris Addis
Alison Boyland
Mark Cowling
Tony Meakin
Joanna Millar
Vincent O'Farrell
Diane Stanley
Marion Roberts
Tandy Watson**

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1. Reference and administration details

1.1. Charity Name and Registration

The name of the Charity is The Living Tree.

The Living Tree is a Charitable Incorporated Organisation registered with the Charity Commission on 27 February 2020 with registration no. 1188213.

The Living Tree is registered with HM Revenue & Customs.

1.2. The Living Tree's Address

The Old Vicarage, Higher Street, Bradpole, BRIDPORT, Dorset. DT6 3JA

Email address: mail@thelivingtree.org.uk

Website address: <https://www.thelivingtree.org.uk>

1.3. Names of the Trustees who manage the Charity

	<i>Role</i>	<i>Appointed</i>	<i>Resigned</i>
Chris Addis		11 January 2023	
Alison Boyland		26 September 2020	
Mark Cowling		21 June 2023	
Tony Meakin		2 November 2022	14 May 2025
Joanna Millar	Chair	21 February 2020	
Vincent O'Farrell	Treasurer	21 February 2020	
Diane Stanley		27 January 2021	12 April 2024
Marion Roberts		14 May 2025	
Tandy Watson		14 May 2025	

1.4. Names of advisors and senior volunteers

Tan Cox, Friday Drop-in Organiser

Ann Jeffrey, Outreach Stall Organiser

Liz Baker, Administrator and Website/Newsletter Editor

Steph Crabb, Trustee Minutes Secretary

Nikki Bareham, Social Media Editor

1.5. Bank

NatWest Bank, 22 East St, Bridport, Dorset. DT6 3LG

2. Structure, Governance and Management

2.1. Type of Governing Document

Charitable Incorporated Organisation: Association Model

2.2. Charitable Objects

For the public benefit, to relieve the needs of, and preserve and protect good health amongst people diagnosed with and recovering from treatment for cancer (including their family, friends and relatives who have been affected by such cancer) in Dorset, East Devon and South Somerset and the surrounding areas by providing services, activities and facilities for such persons, including but not limited to the provision of social, counselling, educational, creative, musical and recreational activities and guidance and information on the setting up and running of cancer support groups.

2.3. Trustee selection methods

There must be at least three charity trustees. The maximum number of trustees is 12. In accordance with the Constitution, Trustees are appointed or re-appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees.

In appointing Trustees, due consideration is given to ensuring that the Trustees have between them the skills and experience necessary to manage the charity effectively and in accordance with charity law.

Any suitable person who enquires about becoming a Living Tree Trustee is provided with a copy of the Charity Commission CC3 document ***The essential trustee: what you need to know, what you need to do*** and ***The Living Tree Constitution***. If they still wish to be considered for appointment as a Trustee, they are invited for an informal interview with the Trustees. Prior to any appointment, the potential Trustee is requested to complete a DBS check, a Declaration of Eligibility form and a Register of Conflict of Interests for Trustees Form. Once formally appointed, the new Trustee is provided with copies of all Living Tree adopted Policies.

Trustees are encouraged to participate in development opportunities as and when appropriate.

The Living Tree is a member of the Dorset Community Action Trustees Club and has access to advice from them.

The Trustees are encouraged to develop their own skills and knowledge by being actively involved in not just the day to day running of The Living Tree, but also by taking on additional responsibilities such as coordinating Allotment activities, administering The Living Tree Therapists Partnership and leading the activities at the regular Friday Drop-ins.

2.4. Register of Members

In order to fulfil Charity Commission requirements, we maintain a Register of Members. New attendees at our Friday Drop-ins are invited to apply to become a Member by completing a simple application form. There is no charge for membership. Non-Members can continue to benefit from services offered by The Living Tree but only Members may vote on any resolutions at General Meetings including approving the appointment of Trustees. The Membership Register is managed by our Administrator.

3. Activities

3.1. Statutory Declaration

The Trustees confirm that they have complied with their duty to have due regard to the Charity Commission's public benefit guidance when exercising any powers or duties to which the guidance is relevant.

3.2. Summary of main activities

The Living Tree holds a weekly Drop-in Meeting on Friday afternoons in an accessible venue in central Bridport, preceded by twice monthly Yoga, Mindfulness, and Tai Chi sessions. Each Drop-in session starts with a *Tripudio Flow* lymphatic exercise session.

The Drop-in sessions offer regular speakers, creative activities plus access to our library stocked with relevant cancer related books and leaflets. We also provide help and advice every day of the year through the maintenance of a dedicated mobile phone number and email address via which the public can contact the charity with enquiries. The charity also maintains a website, publishes a monthly newsletter and maintains a Facebook page.

We have continued to develop The Living Tree Therapists Partnership (LTP) with local complementary therapists whereby approved therapists provide therapies to our members funded by The Living Tree. Members can apply to receive six free sessions with a Partnership therapist of their choice.

The administrator of the LTP (supported by other Trustees and volunteers) responds to new therapy requests, offers telephone and email support, and manages enquiries and applications from potential new therapists.

Our other regular activities include an Ambling (walking) group, weekly table tennis sessions at both Bridport Leisure Centre and Salway Ash Village Hall, and a weekly Splash Club swimming session at Highlands End pool.

We rent an adjacent pair of Bridport Town Council allotments which are used to grow flowers, fruit and vegetables. The allotments contain a greenhouse, shed and fruit cages and have parking nearby.

We usually have an outreach stall at community events during the summer – many hosted by Bridport Town Council but also some events such as village fetes around Bridport - including the Bridport Charter Fair, Bridport Food Festival, Bradpole Fete, Loders Fete, Melplash Show. Towards the end of the year we had outreach stalls at the Bridport United Church Christmas Tree Festival, the Bridge House Hotel Christmas Fair and the annual Bridport Town Council Christmas Cheer event.

4. Achievements and Performance

4.1. Outputs and Outcomes for the Charity's Beneficiaries

The Living Tree holds a weekly Drop-in session on Friday afternoons in an accessible venue in central Bridport (the Friends/Quaker Meeting House). The Drop-in sessions offer regular speakers, creative activities plus access to our library stocked with relevant cancer related books and leaflets, as well as the opportunity for refreshments and social interaction with others. Attendees can arrive and leave when most convenient to themselves and can choose to participate or not in the activities through the afternoon. Each Drop-in starts with a short 15 minute *Tripudio Flow* lymphatic exercise session.

The Friday Drop-in regular creative sessions give attendees an opportunity to participate in singing, art, and literary activities led by locals who specialise in those creative activities.

The charity organises twice monthly Yoga and Mindfulness sessions at the same accessible venue preceding each Drop-in, with a twice monthly Tai Chi session following each Drop-in. The charity added the twice monthly Tai Chi session in September 2024 aligned to the same Fridays as the Mindfulness session because it was clear that the two therapies shared a very similar audience.

The charity also provides a dedicated mobile phone number and email address via which the public can contact the charity with enquiries. The charity also maintains a website, publishes a monthly newsletter and maintains a Facebook page.

The Living Tree Therapists Partnership (LTTTP) offers access to local complementary therapists. Approved therapists on the LTTTP list provide therapeutic sessions to our members which are funded by The Living Tree. Members can apply to receive six free sessions with a Partnership therapist of their choice. The administrator of the LTTTP (supported by other Trustees and volunteers) responds to new therapy requests, offers telephone and email support, and manages enquiries and applications from potential new therapists.

The charity organises and funds weekly table tennis sessions at two local centres, one in Bridport town and one in a village north of the town (Bridport Leisure Centre and Salway Ash Village Hall).

It also organises a session called Splash Club - exclusively for Living Tree swimmers - in a local swimming pool (at Highlands End Holiday Park) on an evening each week.

Ambles is the charity's name for its walking group. Ambles, which happen once or twice a month, are organised and led by the group leader and give participants the opportunity for exercise while gently walking through the AONB landscape around Bridport.

The charity rents two adjacent allotments from Bridport Town Council which are used to grow flowers, fruit and vegetables. The allotments contain a greenhouse, shed and fruit cages and have parking nearby. There is a regular gardening session at the allotment on a Wednesday morning at which all Living Tree members are welcome. The allotment is used to promote a healthy fruit and vegetable rich diet and support the principles of self-sufficiency.

4.2. How the public have benefited

The Living Tree's core aim is to improve the quality of life of those living in Bridport and the wider community who have been affected by cancer in any way. We aim to achieve this by the provision of cancer related information, and by providing opportunities to take part in various activities which will enhance the quality of their lives.

We publish and distribute a monthly newsletter to our mailing list of more than 300 subscribers. This newsletter provides an update to the public including health and voluntary sectors and our own members on recent events and activities plus notice of events and activities happening in the near future. In addition, we share a weekly update via our Facebook and Instagram accounts.

Our website continues to be regularly updated and is a useful initial source of information on our services and activities.

We have an outreach stall at many community events during the summer – these are often hosted by Bridport Town Council but other examples include village fetes around Bridport. Those at which we regularly support include the Bridport Charter Fair, Bridport Food Festival, Bradpole Fete, and Melpash Show. Towards the end of the year, we usually have outreach stalls at the Bridport United Church Christmas Tree Festival, the Bridge House Hotel Christmas Fair and the annual Bridport Town Council Christmas Cheer event.

Our outreach stalls at local events have raised the profile of The Living Tree and provided information to the local community, and holidaymakers who often state they don't have time to access advice in their home county, or know where to access such advice. Our Living Tree publicity resources, such as leaflets, are available in public locations such as GP surgeries, local hospitals, Libraries, and village halls.

The existence of The Living Tree as a local support group has enabled local health services, such as the NHS social prescribing service, the cancer Clinical Nurse Specialists based at Dorset County Hospital, and local GPs, to refer patients, carers, relatives and the bereaved to a local support group, where they know help will be given.

4.3. Contributing to activities run by other organisations

The Stepping Out Cancer Rehabilitation Community Support Group is also based in Bridport and we have continued to support this organisation by sharing information about their Scheme at our weekly Drop-in sessions, on our outreach stall, on our website, and in our newsletter.

We also promote other cancer support groups, particularly local ones with whom we have direct contact, by providing their contact details in our newsletter, on our website, and by making copies of their promotional leaflets available at our weekly Drop-in sessions.

4.4. Trustee development

Trustees are encouraged to develop their own skills and knowledge by being actively involved in not just the day to day running of The Living Tree, but also by taking on additional responsibilities such as managing the allotment project. All Trustees have been supplied with the Charity Commission's Guide - ***The essential trustee: what you need to know, what you need to do***, which, amongst other areas, advises them on how to develop their role bearing in mind their responsibilities.

All of our policies are reviewed annually and are available online to Trustees on our Google Drive. As part of the induction of new Trustees, the charity provides them with access to our current set of policies. We continue to update and add to the set of policies to ensure we follow Charity Commission guidelines.

5. Financial Review

5.1. Details of any Funds materially in deficit

The Charity has no funds which are materially in deficit.

5.2. Policy on Reserves

The Charity's policy on reserves is to maintain a bank balance which is sufficient to cover the level of recent average annual payments (c£18,000) in case of unforeseen and/or unavoidable circumstances precipitating a short-term fall in its receipts.

5.3. Principal sources of funding and outgoings

Principal sources of funding:

Donations from local community groups and charities that have closed.

One-off donations from members and supporters.

Sales of books and greetings cards produced by members of the Charity.

Local fund-raising events.

Collection boxes at local pubs, shops, events.

Principal outgoings:

Therapist fees including Mindfulness, Yoga, Tai Chi, Singing, Living Tree Therapists Partnership.

Activity costs including Table Tennis, Swimming, Amblers.

Allotment expenses.

Administration including fees for services provided by third parties (admin support, website maintenance, newsletter production, social media promotion).

5.4. Remuneration of Trustees

All Trustees act in a voluntary capacity and receive no remuneration or other material benefits from their services to The Living Tree.

Out-of-pocket expenses necessarily and reasonably incurred by Trustees in promoting the purposes of The Living Tree are reimbursed at cost.

5.5. Financial Status

Though modest, the Charity's current resources from all sources are more than sufficient to meet its outgoings for at least the next year.

All the indications are that this will remain the case for the foreseeable future.

5.6. Statutory Statements on Liabilities

The Trustees declare that:

- The Living Tree has given no guarantees where potential liability under the guarantee is outstanding at the date of this statement.
- The Living Tree has no debt outstanding at the date of this statement which is owed by the CIO and which is secured by an express charge on any assets of the CIO.

6. Statement of Financial Activity

6.1. Receipts and Payments accounts for the period ended 31 December 2024

Receipts and payments accounts						
	Period start date		To	Period end date		
	1/1/2024			31/12/2024		
	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						
Allotment	60	-	-		60	-
Card/book sales	553	-	-		553	365
Other sales	170	-	-		170	7,517
Collection boxes	941	-	-		941	775
Grants & Fundraising	-	9,800	-		9,800	-
Donations towards	120	-	-		120	77
Amblers refreshments						
Other donations	13,817	-	-		13,817	9,369
Sub total (Gross income for AR)	15,661	9,800	-		25,461	18,103
A2 Asset and investment sales, (see table). None						
Sub total	-	-	-		-	-
Total receipts	15,661	9,800	-		25,461	18,103
A3 Payments						
Administration	3,453	-	-		3,453	1,686
Allotment	240	856	-		1,096	586
Amblers refreshments	155	-	-		155	272
Bridport Community Hospital Exhibition	518	-	-		518	-
Donations passed on to others	640	-	-		640	-
Friends Meeting House rent	2,330	-	-		2,330	1,530
Friday Drop-in expenses	357	-	-		357	339
Fundraising expenses	-	900	-		900	3,230
Glitter Ball – 50% net funds raised to Stepping Out	-	-	-		-	2,143
Insurance	307	-	-		307	297
Library books	-	-	-		-	49
Living Tree Therapists Partnership	720	-	-		720	843
Mindfulness sessions	720	-	-		720	1,070

Printing	847	-	-	847	530
Singing sessions	225	-	-	225	315
Social media promotion	1,150	-	-	1,150	865
Table Tennis sessions	891	486	-	1,377	2,207
Tai Chi sessions	-	120	-	120	-
Training	375	-	-	375	500
Website/newsletters	1,800	-	-	1,800	1,872
Workshops	352	-	-	352	830
Yoga	1,300	-	-	1,300	1,435
Sub total	16,380	2,362	-	18,742	20,599

A4 Asset and investment purchases, (see table)					
None					
Sub total	-	-	-	-	-

Total payments	16,380	2,362	-	18,742	20,599
Net of receipts/(payments)	(719)	7,438	-	6,719	(2,496)

A5 Transfers between funds					
None					

A6 Cash funds last year end	34,258			34,258	36,754
Cash funds this year end	33,539	7,438	-	40,977	34,258

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	NatWest current account	33,528	7,438	-
	Petty cash	11	-	-
	Total	33,539	7,438	-

B2 Other monetary assets				
None				

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			
None			

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

Table Tennis tables	2 tables at Bridport Leisure Centre			Fixed assets		-	
Table Tennis tables	3 tables at Salwayash Village Hall			Fixed assets		-	
Jo's bench	At Highlands End			Fixed assets		-	
Allotment equipment	Shed, greenhouse, planters, gardening tools			Fixed assets		-	
B5 Liabilities	Details			Fund to which liability relates		Amount due (optional)	When due (optional)
Therapists	Invoices for December			Unrestricted		300	
Other suppliers	Invoices for December			Unrestricted		1,131	

6.2. Notes to the Accounts

- a) Accounting Policies
The financial statements have been prepared in accordance with the Charities Act 2011 Section 133, using the Receipts and Payments basis available to small charities and the charity's own accounts spreadsheet.
- b) Reimbursement of out-of-pocket expenses
Out-of-pocket expenses incurred necessarily, reasonably and incidentally in the course of the Charity's activities are reimbursed at cost.
- c) Salaries & Professional Fees
No trustee receives any payments for the services they provide to the charity. In the current financial year the charity employed no staff or external contractors.
- d) Fixed Assets
The Charity has acquired but not disposed of any fixed assets in the current financial year.
- e) Creditors & Debtors
Cheques for goods or services purchased, or invoices for goods or services delivered, which are issued prior to the end of the financial year but not appearing in the end of financial year bank statements are reported as outstanding creditors or debtors respectively.
- f) Rounding Discrepancies
All amounts are recorded to the penny, but in these accounts are shown as digitally rounded to the nearest pound. This can occasionally result in a total apparently not being the sum of its constituent amounts. All individual amounts, and their totals, are nevertheless correct.

7. Approval of the Board of Trustees

The Trustees declare that they have approved the above Annual Report & Statement of Financial Activity.

Signed on behalf of the Trustees

Date 29 Oct 2025



Joanna Millar (President)



Vincent O'Farrell (Chair)



Section A Independent Examiner's Report

Report to the trustees

Charity Name
The Living Tree

On accounts for the year ended

31 December 2024	Charity no (if any)	1188213
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Set out on pages

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31/12/2024**.

Responsibilities and basis of report

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

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

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

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

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

Signed: 

Date: 29 Oct 2025

Name: Simon Hartley

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

Address: The Grove, Rax Lane
Bridport
DT6 3JL

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

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

THE LIVING TREE

England & Wales - Charity number 1188213

Accounts



The Living Tree

Living well with and beyond cancer

Trustees' Annual Report and Statement of Financial Activity for the period 1 January 2023 to 31 December 2023

Trustees

Chris Addis

Alison Boyland

Mark Cowling

Tony Meakin

Joanna Millar

Vincent O'Farrell

Diane Stanley

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1. Reference and administration details

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Email address: mail@thelivingtree.org.uk

Website address: <https://www.thelivingtree.org.uk>

1.3. Names of the Trustees who manage the Charity

	<i>Role</i>	<i>Appointed</i>	<i>Resigned</i>
Chris Addis		11 January 2023	
Carol Banks		14 April 2021	14 April 2023
Alison Boyland		26 September 2020	
Mark Cowling		21 June 2023	
Peter Green		21 February 2020	14 April 2023
Tony Meakin		2 November 2022	
Joanna Millar	Chair	21 February 2020	
Vincent O'Farrell	Treasurer	21 February 2020	
Diane Stanley		27 January 2021	

1.4. Names of advisors and senior volunteers

Tan Cox, Administrator

Ann Jeffrey, Outreach Stall Organiser

Liz Baker, Webmaster and Newsletter Editor

Steph Crabb, Trustee Minutes Secretary

Nikki Bareham, Social Media Editor

Helen Ebdon, Friday Drop-in Volunteer Coordinator

Simon Wenham, Membership database and Gmail account Coordinator

1.5. Bank

NatWest Bank, 22 East St, Bridport, Dorset. DT6 3LG

2. Structure, Governance and Management

2.1. Type of Governing Document

Charitable Incorporated Organisation: Association Model

2.2. Charitable Objects

For the public benefit, to relieve the needs of, and preserve and protect good health amongst people diagnosed with and recovering from treatment for cancer (including their family, friends and relatives who have been affected by such cancer) in Dorset, East Devon and South Somerset and the surrounding areas by providing services, activities and facilities for such persons, including but not limited to the provision of social, counselling, educational, creative, musical and recreational activities and guidance and information on the setting up and running of cancer support groups.

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The Living Tree is a member of the Dorset Community Action Trustees Club and has access to advice from them.

The Trustees are encouraged to develop their own skills and knowledge by being actively involved in not just the day to day running of The Living Tree, but also by taking on additional responsibilities such as running the allotment project, The Therapists Partnership and arranging speakers for Friday Drop-ins.

2.4. Register of Members

In order to fulfil Charity Commission requirements, we maintain a Register of Members. New attendees at our Friday Drop-ins are invited to apply to become a Member by completing a simple application form. There is no charge for membership. Non-Members can continue to benefit from services offered by The Living Tree but only Members may vote on any resolutions at General Meetings including approving the appointment of Trustees. The Membership Register is managed by our Gmail account Secretary.

3. Activities

3.1. Statutory Declaration

The Trustees confirm that they have complied with their duty to have due regard to the Charity Commission's public benefit guidance when exercising any powers or duties to which the guidance is relevant.

The Living Tree holds a weekly Friday Drop-in Meeting from 2-4.30pm in an accessible venue in central Bridport, preceded by alternate weekly Yoga and Mindfulness sessions and 'Tripudio Flow' sessions. The drop-in sessions offer regular speakers, creative activities plus access to our library stocked with relevant cancer related books and leaflets. We also provide help and advice every day of the year through the maintenance of a dedicated mobile phone service, an email address, website, monthly newsletter and Facebook page. There are plans to develop an informal telephone support scheme to eventually develop a more formal buddying and befriending service.

We have continued to develop The Living Tree Therapists Partnership (LTTP) with local complementary therapists whereby approved therapists provide therapies to our members funded by The Living Tree. Members can apply to receive six free sessions with a Partnership therapist of their choice.

The Trustee responsible for the LTTP has continued to respond to counselling requests, offered telephone and email support, and helps link in with any potential new suitable therapists.

Our other activities include a regular Ambling (walking) group, table tennis sessions at Bridport Leisure Centre and Salway Ash Village Hall each week, and a weekly Splash Club swimming session at Highlands End pool.

We have a popular allotment area spread over a wide area containing greenhouse and fruit cages, we grow flowers, fruit and vegetables. The allotment is in Bridport and is on a level site with parking nearby.

We join with community events hosted by Bridport Town including events in outlying areas. These include the Charter Fair, Food Festival, Bradpole Fete, Melplash Show and towards the end of the year we had a presence at the Christmas Tree Festival, the Bridge House Hotel Christmas Fair and the annual Christmas Cheer event.

4. Achievements and Performance

4.1. Outputs and Outcomes for the Charity's Beneficiaries

We have remained very busy throughout 2023. Our allotment venue had a good year, and we were able to provide a delicious Harvest Lunch to our members. The allotment remains a popular venue for our members, to receive support from our charity whilst enjoying the emotional and physical benefits of gardening and healthy outdoors exercise. Each week towards the end of the morning we provide nutritious snacks & drinks often made from our produce.

Our allotment tile mosaic project was started this year. The mosaic is being completed inside the greenhouse and once finished will form a table top for use at the allotment.

The Allotment group were invited to visit Hogchester Meadows and Farm to explore their wildflower meadows. This connection has led to us being able to invite the farm owner, Rob Powell, to join our Living Tree Therapist Partnership as a counsellor and psychotherapist. All the therapists hold professional qualifications, have appropriate insurance, and have a current DBS check.

On the recommendation of Macmillan, we have welcomed another cancer support group from the Isle of Wight called 'Open Umbrella', who wanted to hear from us about how we had made a success of The Living Tree.

We continue to prioritise recruitment of further volunteers and new trustees. This became more important following the decision of the Chair in August 2022 to inform fellow trustees of her wish to step down as Chair following ten years in office. There followed over the year several meetings on succession planning, including in May 2023, the decision to employ an administrator to take on the routine tasks of managing the Charity, including co-ordinating membership, volunteers and the Friday drop-in. We also welcomed a new trustee June 2023 when Mark Cowling joined our Board.

Fundraising continues to be supported by several outreach stalls held in local supermarkets. During the latter part of the year, The Living Tree has been provided with a grant to fund a part-time fundraiser for one year, this has been taken up by the Administrator who is assisted by two Trustees.

We have held a "Wellbeing in Nature" day at Higher Ford Farm; this allowed participants to create their own personalised, nature-based wellbeing plan.

Our Chair, Jo Millar, was presented with the "Above & Beyond" award for her outstanding contribution to the community by Bridport Town Council at the town's Charter Fair in May.

The Living Tree charity itself was also awarded the Macmillan's national "Thanks to You" award, in the "With Ambition" category, in recognition of the charity's "exceptional contribution to the lives of people affected by cancer".

In October we hosted a Glitter Ball fundraising event which was very successful. The event was also a fundraiser for Stepping Out (our local cancer rehabilitation exercise scheme) with profits split equally between the two charities.

As Christmas approached, we held our second successful Christmas wreath making workshop.

4.2. How the public have benefited.

The Living Tree's core aim is to improve the quality of life of those living in Bridport and the wider community who have been affected by cancer in any way. We aim to achieve this by the provision of cancer related information, and by providing opportunities to take part in various activities which will enhance the quality of their lives.

We produce a monthly newsletter which provides an update to the public including health and voluntary sectors plus our own members on what is coming up in the next month. In addition, we share a weekly update via our Facebook and Instagram accounts.

Our website continues to be regularly updated and is a useful initial source of information on everything we offer.

The Living Tree is able to carry out its work due to the volunteers who continue to help with our main activities, particularly the Friday drop-ins where we offer support arrange drop-in speakers for presentations on a wide range of different topics, including dealing with the effects of illness, nutrition, and healthy eating.

The following responsibilities are all carried out by volunteers: Secretary, Outreach Stall rota organisation, Independent Inspector of accounts, organising table tennis, swimming and walking activities and face-to-face Drop-in support.

Our Outreach Stall at local events has raised the profile of The Living Tree and provided information to the local community and holidaymakers, who often state they don't have time to access advice in their home county or know where to access such advice. Our Living Tree publicity resources, such as leaflets, have been redistributed via GP surgeries and local hospitals.

The existence of The Living Tree as a local support group has enabled local health services, such as the social prescribing service and the Clinical Nurse Specialists based at Dorset County Hospital and local GPs, to refer patients, carers, relatives and the bereaved to a local support group, where they know help will be given.

4.3. Contributing to activities run by other organisations

We continue to network with other local cancer support groups via the bi-monthly Macmillan Network Meeting which are led by our Macmillan engagement leads.

Stepping Out Cancer Rehabilitation Community Support Group is also based in Bridport, and we have continued to support this organisation by sharing information about their Scheme on our Outreach stall, our website and newsletter.

In November 2023 we held a Scottish-themed Quiz Night in support of the local Weldmar Hospice.

We have also promoted other cancer support groups, particularly local ones with whom we have direct contact, by providing links to them on our newsletter and website and distributing their leaflets.

4.4. Trustee development

Trustees are encouraged to develop their own skills and knowledge by being actively involved in not just the day to day running of The Living Tree, but also by taking on additional responsibilities such as managing the allotment project. All Trustees have been supplied with the Charity Commission's Guide - The essential trustee: what you need to know, what you need to do, which,

amongst other areas, advises them on how to develop their role bearing in mind their responsibilities.

All of our policies are reviewed annually and are available online on our Google drive. As part of our induction of new trustees, we make our policies available to them to read. We continue to update them to ensure we fit with Charity Commission guidelines. Safeguarding risks and policies are reviewed annually, usually just before the AGM. Significant risks have been highlighted and mitigated where appropriate.

Training workshops in 2023 have consisted of events in April and May when a group of volunteers were taught how to deliver 'Tripudio Flow', an exercise we offer at the start of every Friday afternoon drop-in.

5. Financial Review

5.1. Details of any Funds materially in deficit

The Charity has no funds which are materially in deficit.

5.2. Policy on Reserves

The Charity's policy on reserves is to maintain a bank balance which is sufficient to cover the level of recent average annual payments (c£18,000) in case of unforeseen and/or unavoidable circumstances precipitating a short-term fall in its receipts.

5.3. Principal sources of funding and outgoings

Principal sources of funding:

Donations from local community groups and charities that have closed.

One-off donations from members and supporters.

Sales of books and greetings cards produced by members of the Charity.

Local fund-raising events.

Collection boxes at local pubs, shops, events.

Principal outgoings:

Therapist fees including Mindfulness, Yoga, Singing, Living Tree Therapists Partnership.

Activity costs including Table Tennis, Swimming, Amblers.

Allotment expenses.

Administration including fees for services provided by third parties (admin support, website maintenance, newsletter production, social media promotion).

5.4. Remuneration of Trustees

All Trustees act in a voluntary capacity and receive no remuneration or other material benefits from their services to The Living Tree.

Out-of-pocket expenses necessarily and reasonably incurred by Trustees in promoting the purposes of The Living Tree are reimbursed at cost.

5.5. Financial Status

Though modest, the Charity's current resources from all sources are more than sufficient to meet its outgoings for at least the next year.

All the indications are that this will remain the case for the foreseeable future.

5.6. Statutory Statements on Liabilities

The Trustees declare that:

- The Living Tree has given no guarantees where potential liability under the guarantee is outstanding at the date of this statement.
- The Living Tree has no debt outstanding at the date of this statement which is owed by the CIO and which is secured by an express charge on any assets of the CIO.

6. Statement of Financial Activity

6.1. Receipts and Payments accounts for the period ended 31 December 2023

Receipts and payments accounts						
		Period start date	To	Period end date		
		1/1/2023		31/12/2023		
	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						
10 Year Anniversary Celebration	-	-	-	-		2,000
Allotment	-	-	-	-		50
Donations towards Amblers refreshments	77	-	-	77		54
Card/book sales	365	-	-	365		1,309
Collection boxes	775	-	-	775		1,034
Glitter Ball fundraiser	7,517	-	-	7,517		-
Other donations	9,368	-	-	9,368		13,342
Jo's bench	-	-	-	-		-
Bank interest	-	-	-	-		5
Sub total (Gross income for AR)	18,103	-	-	18,103		17,794
A2 Asset and investment sales, (see table).						
None						
Sub total	-	-	-	-		-
Total receipts	18,103	-	-	18,103		17,794
A3 Payments						
10 Year Anniversary	-	-	-	-		5,023
Administration	1,686	-	-	1,686		1,058
Allotment	586	-	-	586		3,536
Amblers refreshments	272	-	-	272		178
Cost of card/book sales	-	-	-	-		60
Donations passed on to Stepping Out	-	-	-	-		485
Friends Meeting House rent	1,530	-	-	1,530		1,290
Friday Drop-in expenses	339	-	-	339		355
Glitter Ball fundraising expenses	3,230	-	-	3,230		-
Glitter Ball – 50% net funds raised to Stepping Out	2,143	-	-	2,143		-
Insurance	297	-	-	297		297
Library books	49	-	-	49		21

Living Tree Therapists Partnership	843	-	-	843	2,905
Mindfulness sessions	1,070	-	-	1,070	1,250
Printing	530	-	-	530	309
Singing sessions	315	-	-	315	270
Social media promotion	865	-	-	865	610
Table Tennis sessions	2,207	-	-	2,207	1,406
Training	500	-	-	500	330
Website/newsletters	1,872	-	-	1,872	1,524
Workshops	830	-	-	830	711
Yoga	1,435	-	-	1,435	1,355
Sub total	20,599			20,599	22,973

A4 Asset and investment purchases, (see table)					
None					
Sub total	-	-	-	-	-

Total payments	20,599	-	-	20,599	22,973
Net of receipts/(payments)	(2,496)	-	-	(2,496)	(5,179)

A5 Transfers between funds					
None					

A6 Cash funds last year end					
Cash funds this year end	34,258	-	-	34,258	36,968

Categories	Details			Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	NatWest current account			34,247	-	-
	Petty cash			11	-	-
	Total			34,258	-	-

B2 Other monetary assets					
None					

	Details			Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets						
None						

	Details			Fund to which asset belongs	Cost (optional)	Current value (optional)

B4 Assets retained for the charity's own use							
Table Tennis tables	Two tables at Bridport Leisure Centre			Fixed assets		-	
Jo's bench	At Highlands End			Fixed assets		-	
Allotment equipment	Shed, greenhouse, planters, gardening tools			Fixed assets		-	

B5 Liabilities	Details			Fund to which liability relates		Amount due (optional)	When due (optional)
Therapists	Invoices for December			Payments		-	
Other suppliers	Invoices for December			Payments		649	

6.2. Notes to the Accounts

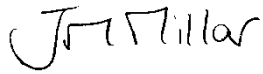
- a) Accounting Policies
The financial statements have been prepared in accordance with the Charities Act 2011 Section 133, using the Receipts and Payments basis available to small charities and the charity's own accounts spreadsheet.
- b) Reimbursement of out-of-pocket expenses
Out-of-pocket expenses incurred necessarily, reasonably and incidentally in the course of the Charity's activities are reimbursed at cost.
- c) Salaries & Professional Fees
No trustee receives any payments for the services they provide to the charity. In the current financial year the charity employed no staff or external contractors.
- d) Fixed Assets
The Charity has acquired but not disposed of any fixed assets in the current financial year.
- e) Creditors & Debtors
Cheques for goods or services purchased, or invoices for goods or services delivered, which are issued prior to the end of the financial year but not appearing in the end of financial year bank statements are reported as outstanding creditors or debtors respectively.
- f) Rounding Discrepancies
All amounts are recorded to the penny, but in these accounts are shown as digitally rounded to the nearest pound. This can occasionally result in a total apparently not being the sum of its constituent amounts. All individual amounts, and their totals, are nevertheless correct.

7. Approval of the Board of Trustees

The Trustees declare that they have approved the above Annual Report & Statement of Financial Activity.

Signed on behalf of the Trustees

Date



Joanna Millar (Chair)

11 October 2024



Vincent O'Farrell (Treasurer)

11 October 2024

THE LIVING TREE

England & Wales - Charity number 1188213

Accounts



The Living Tree

Living well with and beyond cancer

Trustees' Annual Report and Statement of Financial Activity for the period 1 January 2022 to 31 December 2022

Trustees

Joanna Millar

Vincent O'Farrell

Diane Stanley

Alison Boyland

Tony Meakin (from 2 November 2022)

Carol Banks

Peter Green

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1. Reference and administration details

1.1. Charity Name and Registration

The name of the Charity is The Living Tree.

The Living Tree is a Charitable Incorporated Organisation registered with the Charity Commission on 27 February 2020 with registration no. 1188213.

The Living Tree is registered with HM Revenue & Customs.

1.2. The Living Tree's Address

The Old Vicarage, Higher Street, Bradpole, BRIDPORT, Dorset. DT6 3JA

Email address: thelivingtreedorset@gmail.com

Website address: <https://www.thelivingtree.org.uk>

1.3. Names of the Trustees who manage the Charity

	<i>Role</i>	<i>Appointed</i>	<i>Resigned</i>
Carol Banks		14 April 2021	
Alison Boyland		26 September 2020	
Peter Green		21 February 2020	
Tony Meakin		2 November 2022	
Joanna Millar	Chair	21 February 2020	
Vincent O'Farrell	Treasurer	21 February 2020	
Diane Stanley		27 January 2021	

1.4. Names of advisors and senior volunteers

Ruth Jenkins, Independent Inspector of accounts

Ann Jeffrey, Outreach Stall Organiser

Liz Baker, Webmaster and Newsletter Editor

Steph Crabb, Trustee Minutes Secretary

Nikki Bareham, Social Media Editor

Helen Ebdon, Friday Drop-in Volunteer Coordinator

Simon Wenham, Gmail account Secretary

1.5. Bank

NatWest Bank, 22 East St, Bridport, Dorset. DT6 3LG

2. Structure, Governance and Management

2.1. Type of Governing Document

Charitable Incorporated Organisation: Association Model

2.2. Charitable Objects

For the public benefit, to relieve the needs of, and preserve and protect good health amongst people diagnosed with and recovering from treatment for cancer (including their family, friends and relatives who have been affected by such cancer) in Dorset, East Devon and South Somerset and the surrounding areas by providing services, activities and facilities for such persons, including but not limited to the provision of social, counselling, educational, creative, musical and recreational activities and guidance and information on the setting up and running of cancer support groups.

2.3. Trustee selection methods

There must be at least three charity trustees. The maximum number of trustees is 12. In accordance with the Constitution, Trustees are appointed or re-appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees.

In appointing Trustees, due consideration is given to ensuring that the Trustees have between them the skills and experience necessary to manage the charity effectively and in accordance with charity law.

Any suitable person who enquires about becoming a Living Tree Trustee is provided with a copy of the Charity Commission CC3 document ***The essential trustee: what you need to know, what you need to do*** and ***The Living Tree Constitution***. If they still wish to be considered for appointment as a Trustee, they are invited for an informal interview with the Trustees. Prior to any appointment, the potential Trustee is requested to complete a DBS check, a Declaration of Eligibility form and a Register of Conflict of Interests for Trustees Form. Once formally appointed, the new Trustee is provided with copies of all Living Tree adopted Policies.

Trustees are encouraged to participate in development opportunities as and when appropriate.

The Living Tree is a member of the Dorset Community Action Trustees Club and has access to advice from them.

The Trustees are encouraged to develop their own skills and knowledge by being actively involved in not just the day to day running of The Living Tree, but also by taking on additional responsibilities such as running the allotment project, The Therapists Partnership and arranging speakers for Friday Drop-ins.

2.4. Register of Members

In order to fulfil Charity Commission requirements, we maintain a Register of Members. New attendees at our Friday Drop-ins are invited to apply to become a Member by completing a simple application form. There is no charge for membership. Non-Members can continue to benefit from services offered by The Living Tree but only Members may vote on any resolutions at General Meetings including approving the appointment of Trustees. The Membership Register is managed by our Gmail account Secretary.

3. Activities

3.1. Statutory Declaration

The Trustees confirm that they have complied with their duty to have due regard to the Charity Commission's public benefit guidance when exercising any powers or duties to which the guidance is relevant.

To achieve our Objects, The Living Tree holds a weekly Friday Drop-in Meeting from 2-4.30pm in an accessible venue in central Bridport, preceded by alternate weekly Yoga and Mindfulness sessions. The drop-in sessions offer regular speakers, creative activities plus access to our library stocked with relevant cancer related books and leaflets.

We also continue to provide assistance and advice every day of the year through the maintenance of a dedicated mobile phone service, an email address, an informal telephone support scheme with plans to eventually develop a more formal buddying & befriending service, website, monthly newsletter and Facebook page.

We have continued to develop The Living Tree Therapists Partnership (LTTP) with local complementary therapists whereby approved therapists provide therapies to our members funded by The Living Tree. Members can apply to receive six free sessions with a Partnership therapist of their choice. The LTTP is managed by a Trustee. All the therapists hold professional qualifications, have appropriate insurance, and have a current DBS check. Evidence of all these has been checked by the Trustee responsible for administering the Partnership. In addition, the Trustee responsible for the LTTP has continued to respond to counselling requests, offered telephone and email support, & helps link in with any potential new suitable therapists.

Our other activities include a regular Ambling (walking) group, table tennis sessions at Bridport Leisure Centre and Salwayash Village Hall each week, and a weekly Splash Club swimming session at Highlands End pool. We also offer monthly fly-fishing sessions at a Dorset fishing lake, in conjunction with the charity Fishing For Life, for those affected by breast cancer.

The allotment has thrived with weekly gatherings when we continue to grow our own produce and flowers. It remains a popular venue for newer members, men & women, to receive support from our charity whilst enjoying the emotional & physical benefits of gardening & healthy outdoors exercise. Each week towards the end of the morning we provide nutritious snacks & drinks often made from our produce.

Post COVID, we have now reconnected with regular community events in the town such as the Charter Fair, Melplash Show and the Christmas Tree Festival during which we can raise public awareness of the services we offer through our publicity material which we display on our outreach stall. This also gives us an opportunity to sell our own books and cards which we have produced which helps to maintain our income.

The main centre of all Living Tree activities is usually Bridport in Dorset where the Drop-ins are held. All other regular activities are held either in Bridport or within adjacent parishes. The allotment is in Bridport and is on a level site with parking nearby.

4. Achievements and Performance

4.1. Outputs and Outcomes for the Charity's Beneficiaries

We continued to remain very busy throughout 2022. We had several governance training sessions for trustees in January and February with a training consultant from Dorset Community Action. Later in the Spring we developed the Volunteer Training Pack to produce standardised materials which any new volunteer can be given, and these are available on-line and in paper format.

We had many highlights at our allotment, including visits from a local mushroom specialist who helped us to develop our own mushroom logs. We were very grateful to be offered a second adjacent allotment plot by the Town Council and throughout the year established a greenhouse and fruit cages to enable us to grow more plants from seeds. We had support from the local Community Shed who kindly provided the fruit cage frame and work benches to go within the greenhouse. In the Summer we held a delicious harvest lunch for everyone who helps at the allotment. We were very fortunate to be offered a visit to a local National Gardening Scheme Garden as a result of Macmillan and the NGS being impressed with our use of the allotment to support people with cancer. This resulted in a visit to Hogchester Meadows which was very much enjoyed by all.

We continue to prioritise recruitment of further volunteers and new trustees. This became more important following the decision of the Chair in August 2022 to inform fellow trustees of her wish to step down as Chair following ten years in office. There followed over the subsequent Autumn months several focused meetings on succession planning. As a result of wider publicity to recruit more trustees we successfully recruited two retired businessmen in the latter part of 2022 and continue to look at how the admin roles of Chair could gradually be delegated.

Fundraising continues to be supported by several outreach stalls held in local supermarkets, plus we held stalls at two local Christmas fairs at the end of November.

We took part in the annual Bridport Carnival Procession in August and were thrilled to be awarded first place in the 'small walking entry' category.

The main focus of the year was the planning and celebration of our 10-year anniversary which took place at the beginning of September with a wonderful exhibition in Bridport Arts Centre of much of our creative writing and artwork which we have produced over the years. A huge amount of preparation went into this including numerous workshops in the Spring and Summer months to produce the new material specifically for the exhibition. We had amazing help from two of our regular artists who work with us who oversaw and curated the exhibition. A full description and video of the exhibition is available on our website: www.thelivingtree.org.uk/ten-year-celebration

The exhibition was officially opened by the Mayor at a civic evening in early September to which over 150 guests were invited including many of the local businesses, charities, health care professionals, volunteers, therapists, artists and fundraisers who have supported us over the years. The exhibition then ran for the following four days, with Living Tree members and volunteers helping to share the rota for manning exhibition. We received an enormous amount of wonderful feedback about the quality of the work and the impact of our charity in helping people with cancer. In addition, people that had not heard of us were able to come along and see for themselves how they may benefit from becoming involved.

On the Wednesday morning of the week of celebrations, our Ambling Coordinator led a walk through the town which ended at the exhibition. On the Thursday evening, we held a poetry evening led by Rosie Jackson, the poet who had run the initial creative writing workshop at Dorchester Hospital back in September 2012, in which the two co-founders had developed their

ideas for setting up the Charity. This was a wonderful evening, in which Living Tree members read out some of their own poems from our 'Book of Words', plus poems written by the late Jo O'Farrell MBE, plus some of Rosie Jackson's poems.

Finally, the celebrations finished with a party on the Saturday evening for many of our members' friends and guests.

Macmillan gave us a grant towards the costs of the 10-year anniversary activities with the remaining costs funded from a donation from a local older people's group which had closed down in 2021. The donor group asked that the funds be used to financially support Living Tree art and creative activities.

The Charity held a Live Your Life After Cancer (LYLAC) workshop in November. Also in November, the Chair gave a talk to the local Inner Wheel to inform them of the work of the Charity.

As Christmas approached, we took part in a Christmas wreath making workshop for everybody involved at the allotment. We also took part in the local Christmas Tree Festival and had a stall at the annual Christmas Cheer event. Finally, one of our local parish magazines visited our Friday Drop-in in December to write a publicity raising article as a follow up from our 10-year anniversary celebrations. We also learned that Macmillan had nominated us for a national volunteer award to highlight the work of the Charity.

4.2. How the public have benefited.

For the public benefit, to relieve the needs of, and preserve and protect good health amongst people diagnosed with and recovering from treatment for cancer (including their family, friends and relatives who have been affected by such cancer) in Dorset, East Devon and South Somerset and the surrounding areas by providing services, activities and facilities for such persons, including but not limited to the provision of social, counselling, educational, creative, musical and recreational activities and guidance and information on the setting up and running of cancer support groups.

The Living Tree's core aim is to improve the quality of life of those living in Bridport and the wider community who have been affected by cancer in any way. This includes the family, friends, and carers of those who have a diagnosis of cancer, and those who have been bereaved. Our aim is to promote a sense of well-being, to help overcome fears of isolation, loneliness and for the future, to provide mutual support, to help people share their experiences, to help them achieve improved physical and mental health, to provide help and support for the bereaved. We aim to achieve this by the provision of cancer related information, and by providing opportunities to take part in various activities which will enhance the quality of their lives.

The founders of The Living Tree, Jo O'Farrell MBE and Joanna Millar, identified an unmet need in the local community of West Dorset for a holistic cancer support group in 2012 and started The Living Tree. They were aware of the increasing body of evidence which demonstrated that focusing on survivorship helps to increase the long-term survival of those who are diagnosed with cancer.

They aimed to help people recover from the shock of a cancer diagnosis and the effects of treatment, to help them to recover their sense of autonomy and regain control over their own health outcomes.

The Living Tree also recognised the need to help *all* those affected by cancer- patients, carers, families, friends and the bereaved and so welcomes all those who wish to access its services.

We produce a monthly newsletter which provides an update to the public including health and voluntary sectors plus our own members on what is coming up in the next month. In addition, we share a weekly update via our Facebook and Instagram accounts.

Our website continues to be regularly updated and is a useful initial source of information on everything we offer.

The Living Tree is able to carry out its work due to the volunteers who continue to help with our main activities, particularly the Friday drop-ins and our outreach stalls. In addition, the following responsibilities are all carried out by volunteers: Secretary, Outreach Stall rota organisation, Independent Inspector of accounts, organising table tennis, swimming & walking activities, Zoom hosting, and face-to-face Drop-in support.

We support & raise awareness of other charities through our programme of Friday afternoon Drop-in speakers whose presentations will often describe their work with the charity they support.

The existence of The Living Tree as a local support group has enabled local health services, such as the social prescribing service and the Clinical Nurse Specialists based at Dorset County Hospital and local GP's, to refer patients, carers, relatives and the bereaved to a local support group, where they know help will be given. The charity is aware that requests to see our therapists have increased, and are likely to continue to do so, particularly as the NHS services post-pandemic try to tackle the backlog in many areas of treatment.

Our Outreach Stall at local events has raised the profile of The Living Tree and provided information to the local community and holidaymakers, who often state they don't have time to access advice in their home county or know *where* to access such advice.

Updated Living Tree publicity resources, such as leaflets, have been redistributed via GP surgeries and local hospitals.

4.3. Contributing to activities run by other organisations

We continue to network with other local cancer support groups via the bi-monthly Macmillan Network Meeting which are led by our Macmillan engagement leads. These were started during COVID and have proved to be a good source of support and information from guest speakers.

Stepping Out Cancer Rehabilitation Community Support Group is also based in Bridport, and we have continued to support this organisation by sharing information about their Scheme on our Outreach stall, our website and newsletter, sharing the stall, with Stepping Out volunteers joining Living Tree volunteers to promote both services and holding joint fundraising activities.

We have also promoted other cancer support groups, particularly local ones with whom we have direct contact, by providing links to them on our newsletter and website and distributing their leaflets.

Macmillan produced a video in 2019 about The Living Tree and Stepping Out showing how The Living Tree and Stepping Out have improved the lives of those affected by cancer in our area, by interviewing members who attend both groups. They continue to show this video to other organisations and start up support groups as a good Model of a Cancer Support Group.

4.4. Trustee development

The Trustees are encouraged to develop their own skills and knowledge by being actively involved in not just the day to day running of The Living Tree, but also by taking on additional responsibilities such as running the allotment project, The Therapists Partnership and arranging speakers for Friday Drop-ins.

The Trustees have access to the Meet and Greet training from Macmillan; some have already attended this training and other sessions are planned for 2023.

Trustees have attended relevant webinars, such as a Nutrition Conference organised by Yes to Life.

All Trustees have been supplied with the Charity Commission's CC3 Guide, ***The essential trustee: what you need to know, what you need to do***, which, amongst other areas, advises them on how to develop their role bearing in mind their responsibilities.

All of our policies are reviewed annually and are available online on our Google drive. As part of our induction of new trustees, we make our policies available to them to read. We continue to update them to ensure we fit with Charity Commission guidelines.

Safeguarding risks and policies are reviewed annually, usually just before the AGM. Significant risks have been highlighted and mitigated where appropriate.

5. Financial Review

5.1. Details of any Funds materially in deficit

The Charity has no funds which are materially in deficit.

5.2. Policy on Reserves

The Charity's policy on reserves is to maintain a bank balance which is sufficient to cover the level of recent average annual payments (c£16,000) in case of unforeseen and/or unavoidable circumstances precipitating a short-term fall in its receipts.

5.3. Principal sources of funding and outgoings

The Receipts and Payments lines in section 6.1 are listed in more detail than last year, and now in alphabetical order. Some lines in last year's accounts had been aggregated from more detailed lines but this aggregation obscured an understanding of Payments in particular. Despite the change making comparison between the breakdown of the two years less obvious, it was felt that the benefits of the clearer detail this year more than compensates for this disadvantage.

Principal sources of funding:

Donations from local community groups and charities that have closed.

One-off donations from members and supporters.

Sales of books and greetings cards produced by members of the Charity.

Local fund-raising events.

Collection boxes at local pubs, shops, events.

Principal outgoings:

Therapist fees.

Administration including fees for services provided by third parties (admin support, website maintenance, newsletter production, social media promotion)

Allotment expenses.

5.4. Remuneration of Trustees

All Trustees act in a voluntary capacity and receive no remuneration or other material benefits from their services to The Living Tree.

Out-of-pocket expenses necessarily and reasonably incurred by Trustees in promoting the purposes of The Living Tree are reimbursed at cost.

5.5. Financial Status

Though modest, the Charity's current resources from all sources are more than sufficient to meet its outgoings for at least the next year.

All the indications are that this will remain the case for the foreseeable future.

5.6. Statutory Statements on Liabilities

The Trustees declare that:

- ✓ The Living Tree has given no guarantees where potential liability under the guarantee is outstanding at the date of this statement.
- ✓ The Living Tree has no debt outstanding at the date of this statement which is owed by the CIO and which is secured by an express charge on any assets of the CIO.

6. Statement of Financial Activity

6.1. Receipts and Payments accounts for the period ended 31 December 2022

Receipts and payments accounts					
		Period start date	To	Period end date	
		1/1/2022		31/12/2022	

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
10 Year Anniversary Celebration	-	2,000	-	2,000	-
Allotment	-	50	-	50	100
Donations towards Amblers refreshments	54	-	-	54	88
Card/book sales	1,309	-	-	1,309	296
Collection boxes	1,034	-	-	1,034	300
Other donations	8,342	5,000	-	13,342	15,848
Jo's bench	-	-	-	-	15
Bank interest	5	-	-	5	-
Sub total (Gross income for AR)	10,744	7,050	-	17,794	16,647

A2 Asset and investment sales, (see table).					
None					
Sub total	-	-	-	-	-
Total receipts	10,744	7,050	-	17,794	16,647

A3 Payments					
10 Year Anniversary Celebration	23	5,000	-	5,023	-
Administration	1,058	-	-	1,058	579
Allotment	486	3,050	-	3,536	2,010
Amblers refreshments	178	-	-	178	143
Cost of card/book sales	60	-	-	60	-
Donations passed on to Stepping Out	485	-	-	485	241
Friends Meeting House rent	1,290	-	-	1,290	654
Friday Drop-in expenses	355	-	-	355	384
Insurance	297	-	-	297	291
Library books	21	-	-	21	27
Living Tree Therapists Partnership	2,905	-	-	2,905	1,061
Mindfulness sessions	1,250	-	-	1,250	840
Printing	309	-	-	309	95
Singing sessions	270	-	-	270	-

Social media promotion	610	-	-	610	-
Table Tennis sessions	1,406	-	-	1,406	1,020
Training	330	-	-	330	320
Website/newsletters	1,524	-	-	1,524	1,320
Workshops	711	-	-	711	485
Yoga	1,355	-	-	1,355	660
Jo's bench	-	-	-	-	680
Sub total	14,923	8,050	-	22,973	10,567

A4 Asset and investment purchases, (see table)					
None					
Sub total	-	-	-	-	-

Total payments	14,923	8,050	-	22,973	10,567
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Net of receipts/(payments)	(4,179)	(1,000)	-	(5,179)	6,080
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A5 Transfers between funds					
None					

A6 Cash funds last year end	42,152			42,152	42,152
Cash funds this year end	27,968	9,000	-	36,968	37,397

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	NatWest current account	27,894	9,000	-
	Petty cash	74	-	-
	Total cash funds	27,968	9,000	-

B2 Other monetary assets				
Groves Garden Centre credit note		114		

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets				
None				

				Fund to which asset belongs	Cost (optional)	Current value (optional)
	Details					
B4 Assets retained for the charity's own use						
Table Tennis tables	Two tables at Bridport Leisure Centre			Fixed assets	690	
Jo's bench	At Highlands End			Fixed assets	880	
Allotment equipment	Shed, greenhouse, planters, gardening tools			Fixed assets	4,891	

				Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities	Details					
Therapists	Invoices for December			Payments	176	
Other suppliers	Invoices for December			Payments	799	

6.2. Notes to the Accounts

a) Accounting Policies

The financial statements have been prepared in accordance with the Charities Act 2011 Section 133, using the Receipts and Payments basis available to small charities and the charity's own accounts spreadsheet.

b) Restricted funds

Restricted funds carried forward from 2021:

- the Chancery House fund to benefit the elderly of the area (£3,000) was used to improve the facilities at the allotment.

- the 50+ Forum's fund towards art and creative activities (£5,000 + £2,000) was used to cover £3,000 of the costs of the 10-year anniversary event. The fund contained £4,000 at the end of the year.

Restricted funds received in 2022:

- £2,000 from Macmillan towards catering costs for the opening event & the closing party of the 10-year anniversary event.

- a further £5,000 from the closure of Chancery House to benefit the elderly of the area was provisionally allocated to the LTTP and carried forward to 2023.

c) Reimbursement of out-of-pocket expenses

Out-of-pocket expenses incurred necessarily, reasonably and incidentally in the course of the Charity's activities are reimbursed at cost.

d) Salaries & Professional Fees

No trustee receives any payments for the services they provide to the charity. In the current financial year the charity employed no staff or external contractors.

e) Fixed Assets

The Charity has acquired but not disposed of any fixed assets in the current financial year.

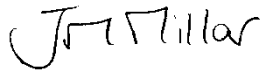
- f) Creditors & Debtors
Cheques for goods or services purchased, or invoices for goods or services delivered, which are issued prior to the end of the financial year but not appearing in the end of financial year bank statements are reported as outstanding creditors or debtors respectively.
- g) Rounding Discrepancies
All amounts are recorded to the penny, but in these accounts are shown as digitally rounded to the nearest pound. This can occasionally result in a total apparently not being the sum of its constituent amounts. All individual amounts, and their totals, are nevertheless correct.

7. Approval of the Board of Trustees

The Trustees declare that they have approved the above Annual Report & Statement of Financial Activity.

Signed on behalf of the Trustees

Date



Joanna Millar (Chair)

26 October 2023



Vincent O'Farrell (Treasurer)

26 October 2023

8. Independent examiner's report on the accounts



CHARITY COMMISSION
FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

Independent Examiner's Report

**Report to the trustees/
members of**

THE LIVING TREE

**On accounts for the year
ended**

31/12/2022

**Charity no
(if any)**

1188213

Set out on pages

Pages 1-9 TAR; pages 10-14 Financial Review & Statement of Financial Activity;
page 15 Approval and signatures

**Responsibilities and
basis of report**

I report to the trustees on my examination of the accounts of the above
charity ("the Trust") for the year ended **31st December 2022**

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

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

**Independent
examiner's statement**

I have completed my examination. I confirm that no material matters have
come to my attention in connection with the examination which gives me
cause to believe that in, any material respect:

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

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

Signed:

Ruth Jenkins

Date:

28th October 2023

Name:

RUTH BARBARA HILDEGARD JENKINS

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

FCCA MAAT ATT

Address:

2 WARNE HILL

BRIDPORT

DORSET DT6 4AQ

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Oct 2018

THE LIVING TREE

England & Wales - Charity number 1188213

Accounts



The Living Tree
Living well with and beyond cancer

**Trustees' Annual Report
and Statement of Financial Activity
for the period 1 January 2021 to 31 December 2021**

Trustees

Carol Banks (from 14 April 2021)

Maria (known as Rita) Bechervaise (until 27 March 2021)

Alison Boyland

Peter Green

Joanna Millar

Vincent O'Farrell

Sheridan Porter (until 27 March 2021)

Diane Stanley (from 27 January 2021)

Mechtild Testroet (until 27 October 2021)

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1. Reference and administration details

1.1. Charity Name and Registration

The name of the Charity is The Living Tree.

The Living Tree is a Charitable Incorporated Organisation registered with the Charity Commission on 27 February 2020 with registration no. 1188213.

The Living Tree is registered with HM Revenue & Customs.

1.2. The Living Tree's Address

The Old Vicarage, Higher Street, Bradpole, BRIDPORT, Dorset. DT6 3JA

Email address: thelivingtreedorset@gmail.com

Website address: <https://www.thelivingtree.org.uk>

1.3. Names of the Trustees who manage the Charity

	<i>Role</i>	<i>Appointed</i>	<i>Resigned</i>
Carol Banks		14 April 2021	
Maria Bechervaise		21 February 2020	27 March 2021
Alison Boyland		26 September 2020	
Peter Green		21 February 2020	
Joanna Millar	Chair	21 February 2020	
Vincent O'Farrell	Treasurer	21 February 2020	
Sheridan Porter		21 February 2020	27 March 2021
Diane Stanley		27 January 2021	
Mechtild Testroet		21 February 2020	27 October 2021

1.4. Names of advisors and senior volunteers

Ruth Jenkins, Independent Inspector of accounts

Rosemary Thorpe, Secretary

Ann Jeffrey, Outreach Stall Organiser

Elizabeth Baker, Webmaster and Newsletter Compiler

1.5. Bank

NatWest Bank, 22 East St, Bridport, Dorset. DT6 3LG

2. Structure, Governance and Management

2.1. Type of Governing Document

Charitable Incorporated Organisation: Association Model

2.2. Charitable Objects

For the public benefit, to relieve the needs of, and preserve and protect good health amongst people diagnosed with and recovering from treatment for cancer (including their family, friends and relatives who have been affected by such cancer) in Dorset, East Devon and South Somerset and the surrounding areas by providing services, activities and facilities for such persons, including but not limited to the provision of social, counselling, educational, creative, musical and recreational activities and guidance and information on the setting up and running of cancer support groups.

2.3. Trustee selection methods

There must be at least three charity trustees. The maximum number of trustees is 12.

In accordance with the Constitution, Trustees are appointed or re-appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees.

In appointing Trustees, due consideration is given to ensuring that the Trustees have between them the skills and experience necessary to manage the charity effectively and in accordance with charity law.

Any suitable person who enquires about becoming a Living Tree Trustee is provided with a copy of the Charity Commission CC3 document ***The essential trustee: what you need to know, what you need to do*** and ***The Living Tree Constitution***. If they still wish to be considered for appointment as a Trustee, they are invited for an informal interview with the Trustees. Prior to any appointment, the potential Trustee is requested to complete a DBS check, a Declaration of Eligibility form and a Register of Conflict of Interests for Trustees Form. Once formally appointed, the new Trustee is provided with copies of all Living Tree adopted Policies.

2.4. Creation of a List of Registered members.

In order to fulfil Charity Commission requirements to have a list of registered members, during March 2021, The Living Tree invited everyone on our mailing list to apply for registered membership and included an explanatory letter clarifying that non-registered members can still continue to benefit from Living Tree services, but only registered members may vote on any resolutions and help select Trustees. The Register now has 24 members.

3. Activities

3.1. Statutory Declaration

The Trustees confirm that they have complied with their duty to have due regard to the Charity Commission's public benefit guidance when exercising any powers or duties to which the guidance is relevant.

4. Achievements and Performance

4.1. Outputs and Outcomes for the Charity's Beneficiaries

The Living Tree's core aim is to improve the quality of life for those who live in Bridport and the wider community who have been affected by cancer in any way. This includes the family, friends and carers of those who have a diagnosis of cancer, and those who have been bereaved. Our aim is to promote a sense of well-being, to help overcome fears of isolation, loneliness and for the future, to provide mutual support, to help people share their experiences, to help them achieve improved physical and mental health, to provide help and support for the bereaved. We aim to achieve this by the provision of cancer related information, and by providing opportunities to take part in various activities which will enhance the quality of their lives.

The founders of The Living Tree, Jo O'Farrell MBE and Joanna Millar, identified an unmet need in the local community of West Dorset for a holistic cancer support group in 2012 and started The Living Tree. They were aware of the increasing body of evidence which demonstrated that focusing on survivorship helps to increase the long-term survival of those who are diagnosed with cancer.

They aimed to help people recover from the shock of a cancer diagnosis and the effects of treatment, to help them to recover their sense of autonomy and regain control over their own health outcomes.

The Living Tree also recognised the need to help *all* those affected by cancer- patients, carers, families, friends and the bereaved and so welcomes all those who wish to access its services.

In order to achieve our Objects, The Living Tree holds a weekly Friday Drop-in Meeting from 2-4.30pm in an accessible venue in central Bridport. During the first half of 2021 these sessions were held via Zoom due to Covid restrictions, with a fortnightly chat & online creativity session or talk alternating with fortnightly mindfulness. But from the end of July we returned to weekly face to face gatherings temporarily in a larger venue, to allow social distancing, combined with a weekly yoga or mindfulness session in our original smaller venue. The drop-in sessions offer regular speakers, creative activities plus access to our library stocked with relevant cancer related books and leaflets.

We also continue to provide assistance and advice every day of the year through the maintenance of a dedicated mobile phone service, an email address, "buddy" befriending system, website, monthly newsletter and Facebook page.

We have continued to develop The Therapists Partnership (LTP) with local complementary therapists whereby approved therapists provide therapies to our members funded by The Living Tree. Members can apply to receive six free sessions with a Partnership therapist of their choice. The LTP is managed by a Trustee. All the therapists hold professional qualifications, have appropriate insurance, and have a current DBS check. Evidence of all these has been checked by the Trustee responsible for administering the Partnership. In addition, the Trustee responsible for the LTP has continued to respond to counselling requests, offered telephone and email support, & helps link in with any potential new suitable therapists.

Our other activities include a regular Ambling group, two separate table tennis clubs each week, and a weekly swimming club, all of which we were able to recommence in the latter part of 2021 once Covid restrictions eased. Plus in May 2021 we began to offer a monthly fly fishing session at a Dorset fishing lake, in conjunction with the charity Fishing For Life, for those affected by breast cancer. In August we held a "Wellness Recovery Action Plan" workshop outside, within the grounds of a local farm, which proved very popular, & we plan to organise more similar events in the future.

The allotment was able to continue throughout the year as we were able to safely meet in small groups outside - we had generous donations of materials from local nurseries and individuals, and were officially "opened" in the spring of 2021 by a local celebratory gardener. It has become a popular venue for newer members, men & women, to receive support from our charity whilst enjoying the emotional & physical benefits of gardening & healthy outdoors exercise. Each week

towards the end of the morning we provide nutritious snacks & drinks often made from our produce.

During 2021, as Covid regulations gradually eased, we were able to recommence participation in a few local outreach events, including a fundraising auction and the Bridport Christmas Tree Festival. Pre-pandemic, these outreach events enabled us to maintain a presence in the minds of local residents and provided opportunities to engage with the public, inform them about the Charity's work and that of other cancer charities, and offer information to those who request it. They also provided us with an opportunity to sell our books and cards, which helps us maintain an income which then funds our activities.

We continued to have regular contact from our Macmillan Engagement Lead by attending bi-monthly Zoom Dorset Cancer Support Groups' Networking Meetings. These enabled representatives from the various local support groups to share concerns and ideas on how we were continuing to try to reach members, plus useful talks from guest speakers such as our local cancer nurse specialists.

The main centre of all Living Tree activities is usually Bridport, West Dorset, where the Drop-ins are held. All other regular activities are held either in Bridport or within adjacent parishes. The allotment is in Bridport and is on a level site with parking nearby.

The Zoom account proved very useful during the height of the pandemic, but remains useful for meetings with anyone unable to attend face to face.

Those further afield and those who live in our catchment area have access to our social media Facebook page.

Our newsletter has been revamped & modernised, with much positive feedback over the new layout & content. By the end of 2021 it had 329 subscribers, allowing both the public, health & voluntary sectors to have up to date information about what we offer.

The Living Tree website has been updated with a new logo & typeface, and improved structure to ease navigation to up to date information about the charity.

The number of beneficiaries, which had dropped during the pandemic, began to recover in the autumn of 2021 when face to face meetings restarted. Other factors which helped included access to the allotment, the telephone "buddy" system and the purchasing of the Zoom account; these measures proved successful and enabled the momentum of the Living Tree's aims and objectives to continue with what would otherwise have been a drastic reduction in what we offer to members or the wider public.

The Living Tree is able to carry out its work due to the volunteers who continue to help with our main activities, particularly the Friday drop-ins and our outreach stalls. In addition, the following responsibilities are all carried out by volunteers:- Secretary, Outreach Stall rota organisation, Independent Inspector of accounts, organising table tennis, swimming & walking activities, Zoom hosting, and face-to-face Drop-in support.

We support & raise awareness of other charities through enabling our Friday afternoon speakers to nominate their charity of choice to receive their speaker fee.

4.2. How the public have benefited.

The general public continue to benefit both in The Living Tree's local community and further afield.

The charity still has a very prominent profile in West Dorset. This year our funds have come from some significant donations from local organisations and continuing sales of in-house produced books and cards. Other donations have been from existing and past members and local groups, plus being made the Mayor of Bridport's "Charity of the Year" for a second year.

Our high profile within our geographical area makes it easier for the local community to contact us if they find themselves in need of our help & services.

The existence of The Living Tree as a local support group has enabled local health services, such as the social prescribing service and the Clinical Nurse Specialists based at Dorset County Hospital and

local GP's, to refer patients, carers, relatives and the bereaved to a local support group, where they know help will be given. The charity is aware that requests to see our therapists have increased, and are likely to continue to do so, particularly as the NHS services post-pandemic try to tackle the backlog in many areas of treatment.

Our Outreach Stall at local events has raised the profile of The Living Tree and provided information to the local community and holidaymakers, who often state they don't have time to access advice in their home county or know *where* to access such advice.

Updated Living Tree publicity resources, such as leaflets, have been redistributed via GP surgeries and local hospitals.

4.3. Contributing to activities run by other organisations

We continued to have regular contact with our Macmillan Engagement Lead and attended bi-monthly Zoom Dorset Cancer Support Groups' Networking Meetings. These enabled representatives from the various support groups to share concerns and ideas on how we were continuing to try to reach members during lockdown.

Stepping Out Cancer Rehabilitation Community Support Group is also based in Bridport and we have continued to support this organisation by sharing information about their Scheme on our Outreach stall, our website and newsletter, sharing the stall, with Stepping Out volunteers joining Living Tree volunteers to promote both services and holding joint fundraising activities.

We have also promoted other cancer support groups, particularly local ones with whom we have direct contact, by providing links to them on our newsletter and website and distributing their leaflets.

Macmillan produced a video in 2019 about The Living Tree and Stepping Out showing how The Living Tree and Stepping Out have improved the lives of those affected by cancer in our area, by interviewing members who attend both groups. They continue to show this video to other organisations and start up support groups as a good Model of a Cancer Support Group.

4.4. Trustee development

Trustees are encouraged to participate in development opportunities as and when appropriate.

The Living Tree is a member of The Dorset Community Action Trustees Club and has access to advice from them.

The Trustees have access to the Meet and Greet training from Macmillan; some have already attended this training and other sessions are planned for 2022.

Trustees have attended relevant webinars, such as a Nutrition Conference organised by Yes to Life.

All Trustees have been supplied with the Charity Commission's CC3 Guide, ***The essential trustee: what you need to know, what you need to do***, which, amongst other areas, advises them on how to develop their role bearing in mind their responsibilities.

The Trustees are encouraged to develop their own skills and knowledge by being actively involved in not just the day to day running of The Living Tree, but also by taking on additional responsibilities such as running the allotment project, The Therapists Partnership and arranging speakers for Zoom Drop-ins.

5. Financial Review

5.1. Details of any Funds materially in deficit

The Charity has no funds which are materially in deficit.

5.2. Policy on Reserves

The Charity's policy on reserves is to generate and maintain a balance which is sufficient to preserve the financial viability of the Charity in the event that unforeseen and/or unavoidable circumstances precipitate a short-term fall in its income.

5.3. Principal sources of funding and outgoings

Principal sources of funding:

Donations from local charities that have closed.

One-off donations from members and supporters.

Sales of books and greetings cards produced by members of the Charity.

Local fund-raising events.

Collection boxes at local pubs, shops, events.

Principal outgoings:

Therapist fees.

Administration.

Allotment equipment.

5.4. Remuneration of Trustees

All Trustees act in a voluntary capacity and receive no remuneration or other material benefits from their services to The Living Tree.

Out-of-pocket expenses necessarily and reasonably incurred by Trustees in promoting the purposes of The Living Tree are reimbursed at cost.

5.5. Financial Status

Though modest, the Charity's current resources from all sources are more than sufficient to meet its outgoings for at least the next year.

All the indications are that this will remain the case for the foreseeable future.

5.6. Statutory Statements on Liabilities

The Trustees declare that:

- ✓ The Living Tree has given no guarantees where potential liability under the guarantee is outstanding at the date of this statement.
- ✓ The Living Tree has no debt outstanding at the date of this statement which is owed by the CIO and which is secured by an express charge on any assets of the CIO.

6. Statement of Financial Activity

6.1. Receipts and Payments accounts for the period ended 31 December 2021

Receipts and payments accounts					
		Period start date	To	Period end date	
		1/1/2021		31/12/2021	

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year (27/2/2020 to 31/12/2020)
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Donation from previous unregistered charity	-	-	-	-	14,532
Bequests	-	-	-	-	20,019
Other donations	6,236	10,000	-	16,236	4,277
Grant received from Macmillan for Embrace	-	-	-	-	160
Sales	296	-	-	296	240
Jo's bench	-	15	-	15	720
Allotment	-	100	-	100	500
Sub total (Gross income for AR)	6,532	10,115	-	16,647	40,448

A2 Asset and investment sales, (see table).					
None					
Sub total	-	-	-	-	-
Total receipts	6,532	10,115	-	16,647	40,448

A3 Payments					
Grant passed on to Embrace	-	-	-	-	160
Donations passed on to Stepping Out	241	-	-	241	-
Administration	1,894	-	-	1,894	1,282
Training	320	-	-	320	-
Insurance	291	-	-	291	295
Rent	654	-	-	654	110
AGM Expenses	-	-	-	-	235
Professional subscriptions	-	-	-	-	25
Library books	27	-	-	27	39
Speakers for weekly meetings	384	-	-	384	80
Activities (Table Tennis, Swimming, Amblers)	1,020	-	-	1,020	175
Workshops	485	-	-	485	120
Therapists fees	2,561	-	-	2,561	1,410
Jo's bench	665	15	-	680	200

Allotment	1,910	100	-	2,010	245
<i>Sub total</i>	10,452	115	-	10,567	4,376

A4 Asset and investment purchases, (see table)					
None					
<i>Sub total</i>	-	-	-	-	-

<i>Total payments</i>	10,452	115	-	10,567	4,376
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<i>Net of receipts/(payments)</i>	(3,920)	10,000	-	6,080	36,072
-----------------------------------	----------------	---------------	---	--------------	---------------

A5 Transfers between funds					
None					

A6 Cash funds last year end	36,072			36,072	
<i>Cash funds this year end</i>	42,152	-	-	42,152	36,072

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	NatWest current account	32,035	10,000	-
	Nationwide Treasurers Trust account	60	-	-
	Petty cash	57		
	Total cash funds	32,152	10,000	-

B2 Other monetary assets					
None					

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets				
None				

	Details			Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use						
Table Tennis tables	Two tables at Bridport Leisure Centre			Fixed assets	690	
Jo's bench	At Highlands End			Fixed assets	880	
Allotment equipment	Shed, greenhouse, planters, gardening tools			Fixed assets	1,881	

	Details			Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities						
None						

6.2. Notes to the Accounts

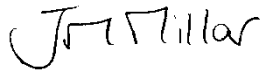
- a) Accounting Policies
The financial statements have been prepared in accordance with the Charities Act 2011 Section 133, using the Receipts and Payments basis available to small charities and the charity's own accounts spreadsheet.
- b) Reimbursement of out-of-pocket expenses
Out-of-pocket expenses incurred necessarily, reasonably and incidentally in the course of the Charity's activities are reimbursed at cost.
- c) Salaries & Professional Fees
No trustee receives any payments for the services they provide to the charity. In the current financial year the charity employed no staff or external contractors.
- d) Fixed Assets
The Charity has acquired but not disposed of any fixed assets in the current financial year.
- e) Creditors & Debtors
Cheques for goods or services purchased, or invoices for goods or services delivered, which are issued prior to the end of the financial year but not appearing in the end of financial year bank statement are reported as outstanding creditors or debtors respectively.
- f) Rounding Discrepancies
All amounts are recorded to the penny, but in these accounts are shown as digitally rounded to the nearest pound. This can occasionally result in a total apparently not being the sum of its constituent amounts. All individual amounts, and their totals, are nevertheless correct.

7. Approval of the Board of Trustees

The Trustees declare that they have approved the above Annual Report & Statement of Financial Activity.

Signed on behalf of the Trustees

Date



Joanna Millar (Chair)

24 October 2022



Vincent O'Farrell (Treasurer)

24 October 2022



Section A

Independent Examiner's Report

Report to the trustees/
members of

THE LIVING TREE

On accounts for the year
ended

31ST DECEMBER 2021

Charity no
(if any)

1188213

Set out on pages

9 – 11 INCLUSIVE

Remember to include the page numbers of additional sheets

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended **31 / 12/ 2021**

Responsibilities and
basis of report

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

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

Independent
examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

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

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

Signed:

Ruth Jenkins

Date:

26/10/2022

Name:

RUTH BARBARA HILDEGARD JENKINS

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

FCCA MAAT ATT

Address:

2 WARNE HILL

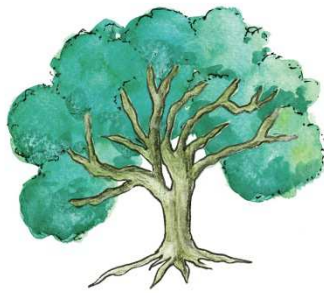
BRIDPORT

DORSET DT6 4AQ

THE LIVING TREE

England & Wales - Charity number 1188213

Accounts



The Living Tree

Living well with and beyond cancer

**Trustees' Annual Report
and Statement of Financial Activity
for the period 27 February 2020 to 31 December 2020
(This is the first accounting period for this registered charity)**

Trustees

Carol Banks (from 14 April 2021)

Maria (known as Rita) Bechervaise (until 27 March 2021)

Alison Boyland (from 26 September 2020)

Peter Green

Joanna Millar

Vincent O'Farrell

Sheridan Porter (until 27 March 2021)

Diane Stanley (from 27 January 2021)

Mechtild Testroet

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1 Reference and administration details

1.1 Charity Name and Registration

The name of the Charity is The Living Tree.

The Living Tree is a Charitable Incorporated Organisation registered with the Charity Commission on 27 February 2020 with registration no. 1188213.

The Living Tree is not registered with HM Revenue & Customs.

1.2 The Living Tree's Address

The Old Vicarage, Higher Street, Bradpole, BRIDPORT, Dorset. DT6 3JA

Email address: thelivingtreedorset@gmail.com

Website address: <https://www.thelivingtree.org.uk>

1.3 Names of the Trustees who manage the Charity

	<i>Role</i>	<i>Appointed</i>	<i>Resigned</i>
Carol Banks		14 April 2021	
Maria Bechervaise		21 February 2020	27 March 2021
Alison Boyland		26 September 2020	
Peter Green		21 February 2020	
Joanna Millar	Chair	21 February 2020	
Vincent O'Farrell	Treasurer	21 February 2020	
Sheridan Porter		21 February 2020	27 March 2021
Diane Stanley		27 January 2021	
Mechtild Testroet		21 February 2020	

1.4 Names of advisors and senior volunteers

Ruth Jenkins, Independent Inspector of accounts

Rosemary Thorpe, Secretary

Maria Newman, Outreach Stall Organiser

Elizabeth Baker, Webmaster and Newsletter Compiler

1.5 Bank

NatWest Bank, 22 East St, Bridport, Dorset. DT6 3LG

2 Structure, Governance and Management

2.1 Type of Governing Document

Charitable Incorporated Organisation: Association Model

2.2 Charitable Objects

For the public benefit, to relieve the needs of, and preserve and protect good health amongst people diagnosed with and recovering from treatment for cancer (including their family, friends and relatives who have been affected by such cancer) in Dorset, East Devon and South Somerset and the surrounding areas by providing services, activities and facilities for such persons, including but not limited to the provision of social, counselling, educational, creative, musical and recreational activities and guidance and information on the setting up and running of cancer support groups.

2.3 Trustee selection methods

There must be at least three charity trustees. The maximum number of trustees is 12.

In accordance with the Constitution, Trustees are appointed or re-appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees.

In appointing Trustees, due consideration is given to ensuring that the Trustees have between them the skills and experience necessary to manage the charity effectively and in accordance with charity law.

Any suitable person who enquires about becoming a Living Tree Trustee is provided with a copy of the Charity Commission CC3 document *The essential trustee: what you need to know, what you need to do* and *The Living Tree Constitution*. If they still wish to be considered for appointment as a Trustee, they are invited for an informal interview with the Trustees. Prior to any appointment, the potential Trustee is requested to complete a DBS check, a Declaration of Eligibility form and a Register of Conflict of Interests for Trustees Form. Once formally appointed, the new Trustee is provided with copies of all Living Tree adopted Policies.

2.4 Creation of a List of Registered members.

In order to fulfil Charity Commission requirements to have a list of registered members, during March 2021, The Living Tree invited everyone on our mailing list to apply for registered membership and included an explanatory letter clarifying that non-registered members can still continue to benefit from Living Tree services, but only registered members may vote on any resolutions and help select Trustees. The Register now has 24 members.

3 Activities

3.1 Statutory Declaration

The Trustees confirm that they have complied with their duty to have due regard to the Charity Commission's public benefit guidance when exercising any powers or duties to which the guidance is relevant.

4 Achievements and Performance

4.1 Outputs and Outcomes for the Charity's Beneficiaries

The Living Tree's core aim is to improve the quality of life for those who live in Bridport and the wider community who have been affected by cancer in any way. This includes the family, friends and carers of those who have a diagnosis of cancer. Our aim is to promote a sense of well-being, to help overcome fears of isolation, loneliness and for the future, to provide mutual support, to help people share their experiences, to help them achieve improved physical and mental health, to provide help and support for the bereaved. We aim to achieve this by the provision of cancer related information, and by providing opportunities to take part in various activities which will enhance the quality of their lives.

The founders of The Living Tree, Jo O'Farrell and Joanna Millar, identified an unmet need in the local community of West Dorset for a holistic cancer support group in 2012 and started The Living Tree. They were aware of the increasing body of evidence which demonstrated that focusing on survivorship helps to increase the long-term survival of those who are diagnosed with cancer.

They aimed to help people recover from the shock of a cancer diagnosis and the effects of treatment, to help them to recover their sense of autonomy and regain control over their own health outcomes.

The Living Tree also recognises the need to help *all* those affected by cancer- patients, carers, families, friends and the bereaved and welcomes all those who wish to access its services.

In order to achieve our Objects, The Living Tree holds a weekly Friday Drop-in Meeting from 2-4.30pm in Bridport, West Dorset in an easily accessible ground floor venue. It also funds and organises a variety of other activities across the week.

It provides assistance and advice every day of the year through the maintenance of a dedicated mobile phone service, an email address, "buddy" befriending system, website, newsletter and Facebook page.

The weekly Friday Drop-in sessions have regular speakers, complementary therapist sessions, creative and artistic activities and provide access to a dedicated Living Tree library with information, books and leaflets. Mindfulness sessions every two weeks alternate with yoga and relaxation sessions. Group counselling sessions have enabled participants to share their worries and to support each other.

We have formed The Therapists Partnership (LTTP) with local complementary therapists whereby approved therapists provide therapies to our members funded by The Living Tree. Members can apply to receive six free sessions with a Partnership therapist of their choice. The LTTP is managed by a Trustee. All the therapists hold professional qualifications, have appropriate insurance, and have a current DBS check. Evidence of all these has been checked by the Trustee responsible for administering the Partnership.

Activities prior to the Covid-19 pandemic have included a regular walking group, two separate table tennis clubs each week, and a weekly swimming club.

The Outreach Events Stall has enabled the Charity's volunteers to attend many local events. This has maintained the presence of a local cancer support group in the minds of local residents and provided opportunities to engage with the public, inform them about the Charity's work and that of other cancer charities and organisations, and offer information to those who request it.

To enable Living Tree volunteers and members to feel comfortable and able to engage with the public and new members, Macmillan Engagement Lead Tracy Street held a **Meet and Greet** Communication workshop on 13th March 2020 attended by 16 members. In order to be of help to people who can be fearful of speaking about cancer, training such as this improves the dialogue between both parties.

The reporting period covers the few weeks since registration as a charity on 27th February 2020 before the first Covid lockdown up until the end of our financial year on 31st December 2020. The above outline of how Living Tree meets its aims and objectives had to be quickly adapted in March

2020. Within weeks the Trustees made the decision to cancel all planned activities ahead of the government lockdown owing to members' particular vulnerability to Covid-19. We then faced the problem of how to keep in touch with and continue to support our members. In late March, the Trustees agreed to produce a fortnightly rather than monthly enhanced newsletter, to offer telephone support, and to post regularly on our Facebook page any latest guidance on Covid-19 and cancer related issues. We established links with Bridport Town Council and the new social prescribing team to ensure we were included in any signposting for those needing support with a cancer diagnosis.

In early May 2020, we invested in a Zoom account to allow the Charity Trustees to continue meeting though virtually, and in late May 2020, we trialled our first Zoom Drop-in Friday afternoon get-together with members – this was a success so we continued with these on a fortnightly basis with guest speakers and creative activities. Members were helped to access the service with IT assistance if required. A Zoom account enabled some activities to continue such as Mindfulness which was a great success on Zoom attracting more members than had attended in person.

Our Therapists Partnership (LTTP) during lockdown was limited to those counsellors and Mindfulness practitioners who could still offer support online. Meanwhile, our Trustee responsible for the Partnership replied to counselling requests, offered email and telephone support and continued to refine the Partnership.

One Trustee, with the consent of the other Trustees, took on the role of deputy Chair in March 2020 at the point when the Chair's workload as a GP was under pressure with the impact of the pandemic. The Deputy's administrative responsibilities included sending cards to sick and bereaved members, hand delivering our newsletter to those without internet access (enabling her to have socially distanced face-to-face contact with those members), working on Living Tree policies, attending the online Carers Forum, and offering socially distanced walks (once Covid-19 restrictions were lifted) with small groups of members.

We continued to have regular contact from our Macmillan Engagement Lead by attending bi-monthly Zoom Dorset Cancer Support Groups' Networking Meetings. These enabled representatives from the various local support groups to share concerns and ideas on how we were continuing to try to reach members during lockdown. We also heard from guest speakers from Macmillan and our local cancer nurse specialists on how cancer services were responding to need.

We received a legacy from a member and will use this to support many future activities, including the development of our allotment. This was acquired from Bridport Town Council in September 2020 following Trustee discussions on how to attract new members during Covid – the idea of an outdoor space was suggested in the knowledge that engaging with nature would be beneficial for mental and physical wellbeing. A new Trustee took on the responsibility for running the allotment project and began to co-ordinate volunteers via a dedicated WhatsApp forum. The project has proved incredibly successful, both in terms of how much has been achieved in growing our own produce, as well as the emotional and social support for those taking part, at a time when many had been reluctant to emerge from the first lockdown. We have invited guest speakers to the allotment to share knowledge on the benefits of gardening and using home produce in a healthy diet.

The main centre of all Living Tree activities is usually Bridport, West Dorset, where the Drop-ins are held. All other regular activities are held either in Bridport or within a 3 mile radius, with the exception of the walking Amblers Group, out of necessity, and any planned outings and workshops, where car sharing is encouraged, to enable those who cannot drive to attend. When our indoor venues had to close during the pandemic, the outdoor allotment started as a direct response for the need for socially distanced gatherings to go ahead proved very popular. The allotment is in Bridport and is on a level site with parking nearby.

The Zoom account enabled members to access our Drop-ins and other online services from the safety of their own homes, no matter where they were in the country.

Those who benefit from The Living Tree include anybody whose life has been affected by cancer in West Dorset, East Devon and South Somerset. This includes relatives, carers, friends and the bereaved. These areas represent the geographical accessibility of our face to face services.

Those further afield and those who live in our catchment area have access to our social media Facebook page, which has over 2,000 followers.

Our newsletter has 329 subscribers, allowing both the public and professional medical staff, amongst others, to have up to date information about what we offer.

The Living Tree website also offers up to date information about the charity and general information about other cancer services.

The number of beneficiaries dropped during the pandemic, particularly during lockdown, causing the Trustees to take other measures to provide access to Living Tree services still available, by starting the allotment, by setting up a telephone "buddy" system along with purchasing of and making use of the Zoom account; these measures proved successful and enabled the momentum of the Living Tree's aims and objectives to continue with what would otherwise have been no services for members or the wider public.

The Living Tree is able to carry out its work due to the volunteers who collectively run the group. The Trustees are volunteers, and the following responsibilities are all carried out by Living Tree volunteers:- Secretary, Outreach Stall organisation, Independent Inspector of accounts, the management of clubs and activities, Zoom hosting, and face-to-face Drop-in support.

Some speakers at Drop-ins ask for expenses, some to be paid a nominal fee and some ask for a donation to a charity of their choice.

4.2 How the public have benefitted.

The general public have benefited both in The Living Tree's local community and nationwide.

The Living Tree has a very prominent profile in West Dorset. All our funds have been from bequests, donations or from the sale of in-house produced books and cards. Donations have been from existing and past members and local groups, such as The Round Table and Bridport Town Council.

This high profile and awareness of The Living Tree's existence enables potential users of The Living Tree to access our services if they ever have need, because they already know we are there to help.

The existence of The Living Tree as a local support group has enabled local health services, such as the social prescribing service and the Clinical Nurse Specialists based at Dorset County Hospital and local GP's, to refer patients, carers, relatives and the bereaved to a local support group, where they know help will be given.

The wider geographic public have benefited too from the daily postings on the Living Tree Facebook page, with general information about cancer, the latest Government Covid advice and inspirational messages of hope.

Our Trustee, Maria Bechervaise, attended a Zoom Carers Forum to speak to carers in the area and also the Dorset County Hospital Discharged Patients Talk, to offer information about the Living Tree and other support groups.

Our Outreach Stall at local events raised the profile of The Living Tree and provided information to the local community and holidaymakers, who often state they don't have time to access advice in their home county or know *where* to access such advice.

Living Tree publicity resources, such as leaflets, are distributed via GP surgeries and local hospitals.

4.3 Contributing to activities run by other organisations

We continued to have regular contact with our Macmillan Engagement Lead and attended bi-monthly Zoom Dorset Cancer Support Groups' Networking Meetings. These enabled representatives from the various support groups to share concerns and ideas on how we were continuing to try to reach members during lockdown.

Stepping Out Cancer Rehabilitation Community Support Group is also based in Bridport and we have continued to support this organisation by sharing information about their Scheme on our

Outreach stall, our website and newsletter, sharing the stall, with Stepping Out volunteers joining Living Tree volunteers to promote both services and holding joint fundraising activities.

We have also promoted other cancer support groups, particularly local ones with whom we have direct contact, by providing links to them on our newsletter and website and distributing their leaflets.

Macmillan produced a video in 2019 about The Living Tree and Stepping Out showing how The Living Tree and Stepping Out have improved the lives of those affected by cancer in our area, by interviewing members who attend both groups. They continue to show this video to other organisations and start up support groups as a good Model of a Cancer Support Group.

4.4 Trustee development

Trustees are encouraged to participate in development opportunities as and when appropriate.

The Living Tree is a member of The Dorset Community Action Trustees Club and has access to advice from them.

The Trustees have access to the Meet and Greet training from Macmillan; some have already attended this training and other sessions are planned for 2022.

Trustees have attended relevant webinars, such as a Nutrition Conference organised by Yes to Life.

All Trustees have been supplied with the Charity Commission's CC3 Guide, ***The essential trustee: what you need to know, what you need to do***, which, amongst other areas, advises them on how to develop their role bearing in mind their responsibilities.

The Trustees are encouraged to develop their own skills and knowledge by being actively involved in not just the day to day running of The Living Tree, but also by taking on additional responsibilities such as running the allotment project, The Therapists Partnership and arranging speakers for Zoom Drop-ins.

5 Financial Review

5.1 Details of any Funds materially in deficit

The Charity has no funds which are materially in deficit.

5.2 Policy on Reserves

The Charity's policy on reserves is to generate and maintain a balance which is sufficient to preserve the financial viability of the Charity in the event that unforeseen and/or unavoidable circumstance precipitate a short-term fall in its income.

5.3 Principal sources of funding and outgoings

Principal sources of funding:

Bequests.

One-off donations from members and supporters.

Sales of books and greetings cards produced by members of the Charity.

Local fund-raising events.

Collection boxes at local pubs, shops, events.

Principal outgoings:

Therapist fees.

Administration.

5.4 Remuneration of Trustees

All Trustees act in a voluntary capacity and receive no remuneration or other material benefits from their services to The Living Tree.

Out-of-pocket expenses necessarily and reasonably incurred by Trustees in promoting the purposes of The Living Tree are reimbursed at cost.

5.5 Financial Status

Though modest, the Charity's current resources from unrestricted donations are more than sufficient to meet its outgoings for at least next year.

All the indications are that this will remain the case for the foreseeable future.

5.6 Statutory Statements on Liabilities

The Trustees declare that:

- ✓ The Living Tree has given no guarantees where potential liability under the guarantee is outstanding at the date of this statement.
- ✓ The Living Tree has no debt outstanding at the date of this statement which is owed by the CIO and which is secured by an express charge on any assets of the CIO.

6 Statement of Financial Activity

6.1 Receipts and Payments accounts for the period ended 31 December 2020

Receipts and payments accounts			
Period start date	To	Period end date	
27/02/2020		31/12/2020	

This is the first accounting period for this registered charity

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Donation from previous unregistered charity	14,532	-	-	14,532	-
Grant received from Macmillan for Embrace	-	160	-	160	-
Bequests	20,019	-	-	20,019	-
Other donations	4,277	-	-	4,277	-
Sales	240	-	-	240	-
Jo's bench	-	720	-	720	-
Allotment	-	500	-	500	-
Sub total (Gross income for AR)	39,068	1,380	-	40,448	-

A2 Asset and investment sales, (see table).					
None					
Sub total	-	-	-	-	
Total receipts	39,068	1,380	-	40,448	-

A3 Payments					
Grant made to Embrace	-	160	-	160	-
Administration	1,282	-	-	1,282	-
Insurance	295	-	-	295	-
Rent	110	-	-	110	-
AGM Expenses	235	-	-	235	-
Professional subscriptions	25	-	-	25	-
Library books	39	-	-	39	-
Speakers for weekly meetings	80	-	-	80	-
Activities (Table Tennis, Swimming)	175	-	-	175	-
Workshops	120	-	-	120	-
Therapists fees	1,410	-	-	1,410	-
Jo's bench	-	200	-	200	-
Allotment	-	245	-	245	-
Sub total	3,771	605	-	4,376	-

A4 Asset and investment purchases, (see table)							
None							
Sub total	-	-	-	-	-	-	-

Total payments	3,771	605	-	4,376	-
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Net of receipts/(payments)	35,297	775	-	36,072	-
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A5 Transfers between funds					
None					

A6 Cash funds last year end					
Cash funds this year end	35,297	775	-	36,072	-

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	NatWest current account	35,238	775	-
	Nationwide Treasurers Trust account	59	-	-
	Total cash funds	35,297	775	-

B2 Other monetary assets				
None				

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets				
None				

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use				
None				

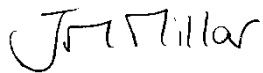
	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities	Jo's bench - final £200 due on delivery	Jo's bench	200	
	Jo's bench - £480 due for engraving	Jo's bench	480	
	Garden shed - final £543 due on delivery	Allotment	543	

6.1.1 Approval of the Board of Trustees

The Trustees declare that they have approved the above Annual Report & Statement of Financial Activity.

Signed on behalf of the Trustees

Date



Joanna Millar (Chair)

27 October 2021



Vincent O'Farrell (Treasurer)

27 October 2021

6.2 Notes to the Accounts

a) Accounting Policies

The financial statements have been prepared in accordance with the Charities Act 2011 Section 133, using the Receipts and Payments basis available to small charities and the charity's own accounts spreadsheet.

b) Reimbursement of out-of-pocket expenses

Out-of-pocket expenses incurred necessarily, reasonably and incidentally in the course of the Charity's activities are reimbursed at cost.

c) Salaries & Professional Fees

No trustee receives any payments for the services they provide to the charity. In the current financial year the charity employed no staff or external contractors.

d) Fixed Assets

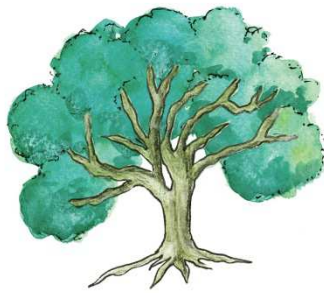
The Charity has not purchased or disposed of any fixed assets in the current financial year.

e) Creditors & Debtors

Cheques for goods or services purchased, or invoices for goods or services delivered, which are issued prior to the end of the financial year but not appearing in the end of financial year bank statement are reported as outstanding creditors or debtors respectively.

f) Rounding Discrepancies

All amounts are recorded to the penny, but in these accounts are shown as digitally rounded to the nearest pound. This can occasionally result in a total apparently not being the sum of its constituent amounts. All individual amounts, and their totals, are nevertheless correct.



The Living Tree

Living well with and beyond cancer

**Trustees' Annual Report
and Statement of Financial Activity
for the period 27 February 2020 to 31 December 2020
(This is the first accounting period for this registered charity)**

Trustees

Carol Banks (from 14 April 2021)

Maria (known as Rita) Bechervaise (until 27 March 2021)

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Vincent O'Farrell

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1 Reference and administration details

1.1 Charity Name and Registration

The name of the Charity is The Living Tree.

The Living Tree is a Charitable Incorporated Organisation registered with the Charity Commission on 27 February 2020 with registration no. 1188213.

The Living Tree is not registered with HM Revenue & Customs.

1.2 The Living Tree's Address

The Old Vicarage, Higher Street, Bradpole, BRIDPORT, Dorset. DT6 3JA

Email address: thelivingtreedorset@gmail.com

Website address: <https://www.thelivingtree.org.uk>

1.3 Names of the Trustees who manage the Charity

	<i>Role</i>	<i>Appointed</i>	<i>Resigned</i>
Carol Banks		14 April 2021	
Maria Bechervaise		21 February 2020	27 March 2021
Alison Boyland		26 September 2020	
Peter Green		21 February 2020	
Joanna Millar	Chair	21 February 2020	
Vincent O'Farrell	Treasurer	21 February 2020	
Sheridan Porter		21 February 2020	27 March 2021
Diane Stanley		27 January 2021	
Mechtild Testroet		21 February 2020	

1.4 Names of advisors and senior volunteers

Ruth Jenkins, Independent Inspector of accounts

Rosemary Thorpe, Secretary

Maria Newman, Outreach Stall Organiser

Elizabeth Baker, Webmaster and Newsletter Compiler

1.5 Bank

NatWest Bank, 22 East St, Bridport, Dorset. DT6 3LG

2 Structure, Governance and Management

2.1 Type of Governing Document

Charitable Incorporated Organisation: Association Model

2.2 Charitable Objects

For the public benefit, to relieve the needs of, and preserve and protect good health amongst people diagnosed with and recovering from treatment for cancer (including their family, friends and relatives who have been affected by such cancer) in Dorset, East Devon and South Somerset and the surrounding areas by providing services, activities and facilities for such persons, including but not limited to the provision of social, counselling, educational, creative, musical and recreational activities and guidance and information on the setting up and running of cancer support groups.

2.3 Trustee selection methods

There must be at least three charity trustees. The maximum number of trustees is 12.

In accordance with the Constitution, Trustees are appointed or re-appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees.

In appointing Trustees, due consideration is given to ensuring that the Trustees have between them the skills and experience necessary to manage the charity effectively and in accordance with charity law.

Any suitable person who enquires about becoming a Living Tree Trustee is provided with a copy of the Charity Commission CC3 document *The essential trustee: what you need to know, what you need to do* and *The Living Tree Constitution*. If they still wish to be considered for appointment as a Trustee, they are invited for an informal interview with the Trustees. Prior to any appointment, the potential Trustee is requested to complete a DBS check, a Declaration of Eligibility form and a Register of Conflict of Interests for Trustees Form. Once formally appointed, the new Trustee is provided with copies of all Living Tree adopted Policies.

2.4 Creation of a List of Registered members.

In order to fulfil Charity Commission requirements to have a list of registered members, during March 2021, The Living Tree invited everyone on our mailing list to apply for registered membership and included an explanatory letter clarifying that non-registered members can still continue to benefit from Living Tree services, but only registered members may vote on any resolutions and help select Trustees. The Register now has 24 members.

3 Activities

3.1 Statutory Declaration

The Trustees confirm that they have complied with their duty to have due regard to the Charity Commission's public benefit guidance when exercising any powers or duties to which the guidance is relevant.

4 Achievements and Performance

4.1 Outputs and Outcomes for the Charity's Beneficiaries

The Living Tree's core aim is to improve the quality of life for those who live in Bridport and the wider community who have been affected by cancer in any way. This includes the family, friends and carers of those who have a diagnosis of cancer. Our aim is to promote a sense of well-being, to help overcome fears of isolation, loneliness and for the future, to provide mutual support, to help people share their experiences, to help them achieve improved physical and mental health, to provide help and support for the bereaved. We aim to achieve this by the provision of cancer related information, and by providing opportunities to take part in various activities which will enhance the quality of their lives.

The founders of The Living Tree, Jo O'Farrell and Joanna Millar, identified an unmet need in the local community of West Dorset for a holistic cancer support group in 2012 and started The Living Tree. They were aware of the increasing body of evidence which demonstrated that focusing on survivorship helps to increase the long-term survival of those who are diagnosed with cancer.

They aimed to help people recover from the shock of a cancer diagnosis and the effects of treatment, to help them to recover their sense of autonomy and regain control over their own health outcomes.

The Living Tree also recognises the need to help *all* those affected by cancer- patients, carers, families, friends and the bereaved and welcomes all those who wish to access its services.

In order to achieve our Objects, The Living Tree holds a weekly Friday Drop-in Meeting from 2-4.30pm in Bridport, West Dorset in an easily accessible ground floor venue. It also funds and organises a variety of other activities across the week.

It provides assistance and advice every day of the year through the maintenance of a dedicated mobile phone service, an email address, "buddy" befriending system, website, newsletter and Facebook page.

The weekly Friday Drop-in sessions have regular speakers, complementary therapist sessions, creative and artistic activities and provide access to a dedicated Living Tree library with information, books and leaflets. Mindfulness sessions every two weeks alternate with yoga and relaxation sessions. Group counselling sessions have enabled participants to share their worries and to support each other.

We have formed The Therapists Partnership (LTTP) with local complementary therapists whereby approved therapists provide therapies to our members funded by The Living Tree. Members can apply to receive six free sessions with a Partnership therapist of their choice. The LTTP is managed by a Trustee. All the therapists hold professional qualifications, have appropriate insurance, and have a current DBS check. Evidence of all these has been checked by the Trustee responsible for administering the Partnership.

Activities prior to the Covid-19 pandemic have included a regular walking group, two separate table tennis clubs each week, and a weekly swimming club.

The Outreach Events Stall has enabled the Charity's volunteers to attend many local events. This has maintained the presence of a local cancer support group in the minds of local residents and provided opportunities to engage with the public, inform them about the Charity's work and that of other cancer charities and organisations, and offer information to those who request it.

To enable Living Tree volunteers and members to feel comfortable and able to engage with the public and new members, Macmillan Engagement Lead Tracy Street held a **Meet and Greet** Communication workshop on 13th March 2020 attended by 16 members. In order to be of help to people who can be fearful of speaking about cancer, training such as this improves the dialogue between both parties.

The reporting period covers the few weeks since registration as a charity on 27th February 2020 before the first Covid lockdown up until the end of our financial year on 31st December 2020. The above outline of how Living Tree meets its aims and objectives had to be quickly adapted in March

2020. Within weeks the Trustees made the decision to cancel all planned activities ahead of the government lockdown owing to members' particular vulnerability to Covid-19. We then faced the problem of how to keep in touch with and continue to support our members. In late March, the Trustees agreed to produce a fortnightly rather than monthly enhanced newsletter, to offer telephone support, and to post regularly on our Facebook page any latest guidance on Covid-19 and cancer related issues. We established links with Bridport Town Council and the new social prescribing team to ensure we were included in any signposting for those needing support with a cancer diagnosis.

In early May 2020, we invested in a Zoom account to allow the Charity Trustees to continue meeting though virtually, and in late May 2020, we trialled our first Zoom Drop-in Friday afternoon get-together with members – this was a success so we continued with these on a fortnightly basis with guest speakers and creative activities. Members were helped to access the service with IT assistance if required. A Zoom account enabled some activities to continue such as Mindfulness which was a great success on Zoom attracting more members than had attended in person.

Our Therapists Partnership (LTTP) during lockdown was limited to those counsellors and Mindfulness practitioners who could still offer support online. Meanwhile, our Trustee responsible for the Partnership replied to counselling requests, offered email and telephone support and continued to refine the Partnership.

One Trustee, with the consent of the other Trustees, took on the role of deputy Chair in March 2020 at the point when the Chair's workload as a GP was under pressure with the impact of the pandemic. The Deputy's administrative responsibilities included sending cards to sick and bereaved members, hand delivering our newsletter to those without internet access (enabling her to have socially distanced face-to-face contact with those members), working on Living Tree policies, attending the online Carers Forum, and offering socially distanced walks (once Covid-19 restrictions were lifted) with small groups of members.

We continued to have regular contact from our Macmillan Engagement Lead by attending bi-monthly Zoom Dorset Cancer Support Groups' Networking Meetings. These enabled representatives from the various local support groups to share concerns and ideas on how we were continuing to try to reach members during lockdown. We also heard from guest speakers from Macmillan and our local cancer nurse specialists on how cancer services were responding to need.

We received a legacy from a member and will use this to support many future activities, including the development of our allotment. This was acquired from Bridport Town Council in September 2020 following Trustee discussions on how to attract new members during Covid – the idea of an outdoor space was suggested in the knowledge that engaging with nature would be beneficial for mental and physical wellbeing. A new Trustee took on the responsibility for running the allotment project and began to co-ordinate volunteers via a dedicated WhatsApp forum. The project has proved incredibly successful, both in terms of how much has been achieved in growing our own produce, as well as the emotional and social support for those taking part, at a time when many had been reluctant to emerge from the first lockdown. We have invited guest speakers to the allotment to share knowledge on the benefits of gardening and using home produce in a healthy diet.

The main centre of all Living Tree activities is usually Bridport, West Dorset, where the Drop-ins are held. All other regular activities are held either in Bridport or within a 3 mile radius, with the exception of the walking Amblers Group, out of necessity, and any planned outings and workshops, where car sharing is encouraged, to enable those who cannot drive to attend. When our indoor venues had to close during the pandemic, the outdoor allotment started as a direct response for the need for socially distanced gatherings to go ahead proved very popular. The allotment is in Bridport and is on a level site with parking nearby.

The Zoom account enabled members to access our Drop-ins and other online services from the safety of their own homes, no matter where they were in the country.

Those who benefit from The Living Tree include anybody whose life has been affected by cancer in West Dorset, East Devon and South Somerset. This includes relatives, carers, friends and the bereaved. These areas represent the geographical accessibility of our face to face services.

Those further afield and those who live in our catchment area have access to our social media Facebook page, which has over 2,000 followers.

Our newsletter has 329 subscribers, allowing both the public and professional medical staff, amongst others, to have up to date information about what we offer.

The Living Tree website also offers up to date information about the charity and general information about other cancer services.

The number of beneficiaries dropped during the pandemic, particularly during lockdown, causing the Trustees to take other measures to provide access to Living Tree services still available, by starting the allotment, by setting up a telephone "buddy" system along with purchasing of and making use of the Zoom account; these measures proved successful and enabled the momentum of the Living Tree's aims and objectives to continue with what would otherwise have been no services for members or the wider public.

The Living Tree is able to carry out its work due to the volunteers who collectively run the group. The Trustees are volunteers, and the following responsibilities are all carried out by Living Tree volunteers:- Secretary, Outreach Stall organisation, Independent Inspector of accounts, the management of clubs and activities, Zoom hosting, and face-to-face Drop-in support.

Some speakers at Drop-ins ask for expenses, some to be paid a nominal fee and some ask for a donation to a charity of their choice.

4.2 How the public have benefitted.

The general public have benefited both in The Living Tree's local community and nationwide.

The Living Tree has a very prominent profile in West Dorset. All our funds have been from bequests, donations or from the sale of in-house produced books and cards. Donations have been from existing and past members and local groups, such as The Round Table and Bridport Town Council.

This high profile and awareness of The Living Tree's existence enables potential users of The Living Tree to access our services if they ever have need, because they already know we are there to help.

The existence of The Living Tree as a local support group has enabled local health services, such as the social prescribing service and the Clinical Nurse Specialists based at Dorset County Hospital and local GP's, to refer patients, carers, relatives and the bereaved to a local support group, where they know help will be given.

The wider geographic public have benefited too from the daily postings on the Living Tree Facebook page, with general information about cancer, the latest Government Covid advice and inspirational messages of hope.

Our Trustee, Maria Bechervaise, attended a Zoom Carers Forum to speak to carers in the area and also the Dorset County Hospital Discharged Patients Talk, to offer information about the Living Tree and other support groups.

Our Outreach Stall at local events raised the profile of The Living Tree and provided information to the local community and holidaymakers, who often state they don't have time to access advice in their home county or know *where* to access such advice.

Living Tree publicity resources, such as leaflets, are distributed via GP surgeries and local hospitals.

4.3 Contributing to activities run by other organisations

We continued to have regular contact with our Macmillan Engagement Lead and attended bi-monthly Zoom Dorset Cancer Support Groups' Networking Meetings. These enabled representatives from the various support groups to share concerns and ideas on how we were continuing to try to reach members during lockdown.

Stepping Out Cancer Rehabilitation Community Support Group is also based in Bridport and we have continued to support this organisation by sharing information about their Scheme on our

Outreach stall, our website and newsletter, sharing the stall, with Stepping Out volunteers joining Living Tree volunteers to promote both services and holding joint fundraising activities.

We have also promoted other cancer support groups, particularly local ones with whom we have direct contact, by providing links to them on our newsletter and website and distributing their leaflets.

Macmillan produced a video in 2019 about The Living Tree and Stepping Out showing how The Living Tree and Stepping Out have improved the lives of those affected by cancer in our area, by interviewing members who attend both groups. They continue to show this video to other organisations and start up support groups as a good Model of a Cancer Support Group.

4.4 Trustee development

Trustees are encouraged to participate in development opportunities as and when appropriate.

The Living Tree is a member of The Dorset Community Action Trustees Club and has access to advice from them.

The Trustees have access to the Meet and Greet training from Macmillan; some have already attended this training and other sessions are planned for 2022.

Trustees have attended relevant webinars, such as a Nutrition Conference organised by Yes to Life.

All Trustees have been supplied with the Charity Commission's CC3 Guide, ***The essential trustee: what you need to know, what you need to do***, which, amongst other areas, advises them on how to develop their role bearing in mind their responsibilities.

The Trustees are encouraged to develop their own skills and knowledge by being actively involved in not just the day to day running of The Living Tree, but also by taking on additional responsibilities such as running the allotment project, The Therapists Partnership and arranging speakers for Zoom Drop-ins.

5 Financial Review

5.1 Details of any Funds materially in deficit

The Charity has no funds which are materially in deficit.

5.2 Policy on Reserves

The Charity's policy on reserves is to generate and maintain a balance which is sufficient to preserve the financial viability of the Charity in the event that unforeseen and/or unavoidable circumstance precipitate a short-term fall in its income.

5.3 Principal sources of funding and outgoings

Principal sources of funding:

Bequests.

One-off donations from members and supporters.

Sales of books and greetings cards produced by members of the Charity.

Local fund-raising events.

Collection boxes at local pubs, shops, events.

Principal outgoings:

Therapist fees.

Administration.

5.4 Remuneration of Trustees

All Trustees act in a voluntary capacity and receive no remuneration or other material benefits from their services to The Living Tree.

Out-of-pocket expenses necessarily and reasonably incurred by Trustees in promoting the purposes of The Living Tree are reimbursed at cost.

5.5 Financial Status

Though modest, the Charity's current resources from unrestricted donations are more than sufficient to meet its outgoings for at least next year.

All the indications are that this will remain the case for the foreseeable future.

5.6 Statutory Statements on Liabilities

The Trustees declare that:

- ✓ The Living Tree has given no guarantees where potential liability under the guarantee is outstanding at the date of this statement.
- ✓ The Living Tree has no debt outstanding at the date of this statement which is owed by the CIO and which is secured by an express charge on any assets of the CIO.

6 Statement of Financial Activity

6.1 Receipts and Payments accounts for the period ended 31 December 2020

Receipts and payments accounts			
Period start date	To	Period end date	
27/02/2020		31/12/2020	

This is the first accounting period for this registered charity

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Donation from previous unregistered charity	14,532	-	-	14,532	-
Grant received from Macmillan for Embrace	-	160	-	160	-
Bequests	20,019	-	-	20,019	-
Other donations	4,277	-	-	4,277	-
Sales	240	-	-	240	-
Jo's bench	-	720	-	720	-
Allotment	-	500	-	500	-
Sub total (Gross income for AR)	39,068	1,380	-	40,448	-

A2 Asset and investment sales, (see table).					
None					
Sub total	-	-	-	-	
Total receipts	39,068	1,380	-	40,448	-

A3 Payments					
Grant made to Embrace	-	160	-	160	-
Administration	1,282	-	-	1,282	-
Insurance	295	-	-	295	-
Rent	110	-	-	110	-
AGM Expenses	235	-	-	235	-
Professional subscriptions	25	-	-	25	-
Library books	39	-	-	39	-
Speakers for weekly meetings	80	-	-	80	-
Activities (Table Tennis, Swimming)	175	-	-	175	-
Workshops	120	-	-	120	-
Therapists fees	1,410	-	-	1,410	-
Jo's bench	-	200	-	200	-
Allotment	-	245	-	245	-
Sub total	3,771	605	-	4,376	-

A4 Asset and investment purchases, (see table)						
None						
Sub total	-	-	-	-	-	-

Total payments	3,771	605	-	4,376	-
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Net of receipts/(payments)	35,297	775	-	36,072	-
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A5 Transfers between funds					
None					

A6 Cash funds last year end					
Cash funds this year end	35,297	775	-	36,072	-

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	NatWest current account	35,238	775	-
	Nationwide Treasurers Trust account	59	-	-
	Total cash funds	35,297	775	-

B2 Other monetary assets				
None				

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets				
None				

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use				
None				

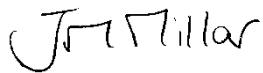
	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities	Jo's bench - final £200 due on delivery	Jo's bench	200	
	Jo's bench - £480 due for engraving	Jo's bench	480	
	Garden shed - final £543 due on delivery	Allotment	543	

6.1.1 Approval of the Board of Trustees

The Trustees declare that they have approved the above Annual Report & Statement of Financial Activity.

Signed on behalf of the Trustees

Date



Joanna Millar (Chair)

27 October 2021



Vincent O'Farrell (Treasurer)

27 October 2021

6.2 Notes to the Accounts

a) Accounting Policies

The financial statements have been prepared in accordance with the Charities Act 2011 Section 133, using the Receipts and Payments basis available to small charities and the charity's own accounts spreadsheet.

b) Reimbursement of out-of-pocket expenses

Out-of-pocket expenses incurred necessarily, reasonably and incidentally in the course of the Charity's activities are reimbursed at cost.

c) Salaries & Professional Fees

No trustee receives any payments for the services they provide to the charity. In the current financial year the charity employed no staff or external contractors.

d) Fixed Assets

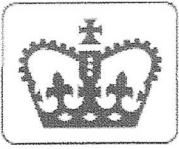
The Charity has not purchased or disposed of any fixed assets in the current financial year.

e) Creditors & Debtors

Cheques for goods or services purchased, or invoices for goods or services delivered, which are issued prior to the end of the financial year but not appearing in the end of financial year bank statement are reported as outstanding creditors or debtors respectively.

f) Rounding Discrepancies

All amounts are recorded to the penny, but in these accounts are shown as digitally rounded to the nearest pound. This can occasionally result in a total apparently not being the sum of its constituent amounts. All individual amounts, and their totals, are nevertheless correct.



Section A

Independent Examiner's Report

Report to the trustees/ members of

THE LIVING TREE

On accounts for the year ended

31.12.2020

Charity no (if any)

1188213

Period 27/2/20 - 31/12/20

Set out on pages

10 - 13

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 27/2/20 - 31/12/20

Responsibilities and basis of report

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

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

Independent examiner's statement

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

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

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

Signed:

Ruth Jenkins

Date:

28th October 2021

Name:

RUTH BARBARA HILDEGARD JENKINS

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

FCCA, MAAT, ATT

Address:

2 WARNE HILL

BRIDPORT

DORSET DT6 4AQ