



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
Sub total	10,452	115	-	10,567	4,376

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

Total payments	10,452	115	-	10,567	4,376
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Net of receipts/(payments)	(3,920)	10,000	-	6,080	36,072
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A5 Transfers between funds					
None					

A6 Cash funds last year end	36,072			36,072	
Cash funds this year end	42,152	-	-	42,152	36,072

Categories	Details		Unrestricted funds	Restricted funds	Endowment funds
			to nearest £	to nearest £	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

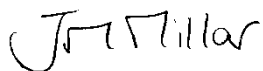
All amounts are recorded to the penny, but in these accounts are shown as digitally rounded to the nearest pound. This can occasionally result in a total apparently not being the sum of its constituent amounts. All individual amounts, and their totals, are nevertheless correct.

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