



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

Contents

1.	Reference and administration details.....	3
1.1.	Charity Name and Registration.....	3
1.2.	The Living Tree's Address	3
1.3.	Names of the Trustees who manage the Charity	3
1.4.	Names of advisors and senior volunteers.....	3
1.5.	Bank	3
2.	Structure, Governance and Management	4
2.1.	Type of Governing Document.....	4
2.2.	Charitable Objects	4
2.3.	Trustee selection methods	4
2.4.	Register of Members	4
3.	Activities	5
3.1.	Statutory Declaration.....	5
4.	Achievements and Performance	6
4.1.	Outputs and Outcomes for the Charity's Beneficiaries	6
4.2.	How the public have benefited.....	7
4.3.	Contributing to activities run by other organisations.....	7
4.4.	Trustee development.....	7
5.	Financial Review	9
5.1.	Details of any Funds materially in deficit.....	9
5.2.	Policy on Reserves	9
5.3.	Principal sources of funding and outgoings.....	9
5.4.	Remuneration of Trustees	9
5.5.	Financial Status	9
5.6.	Statutory Statements on Liabilities.....	9
6.	Statement of Financial Activity	10
6.1.	Receipts and Payments accounts for the period ended 31 December 2023 ..	10
6.2.	Notes to the Accounts	12
7.	Approval of the Board of Trustees.....	13

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	
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.

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.

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 (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 Trustee responsible for the LTP 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	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	
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)
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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

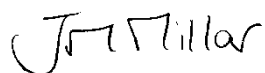
- a) Accounting Policies
The financial statements have been prepared in accordance with the Charities Act 2011 Section 133, using the Receipts and Payments basis available to small charities and the charity's own accounts spreadsheet.
- b) Reimbursement of out-of-pocket expenses
Out-of-pocket expenses 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