



# **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**

# Contents

<b>1.</b>	<b>Reference and administration details.....</b>	<b>3</b>
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
<b>2.</b>	<b>Structure, Governance and Management .....</b>	<b>4</b>
2.1.	Type of Governing Document.....	4
2.2.	Charitable Objects .....	4
2.3.	Trustee selection methods .....	4
2.4.	Register of Members .....	4
<b>3.</b>	<b>Activities .....</b>	<b>5</b>
3.1.	Statutory Declaration.....	5
3.2.	Summary of main activities .....	5
<b>4.</b>	<b>Achievements and Performance .....</b>	<b>6</b>
4.1.	Outputs and Outcomes for the Charity's Beneficiaries .....	6
4.2.	How the public have benefited.....	6
4.3.	Contributing to activities run by other organisations.....	7
4.4.	Trustee development.....	7
<b>5.</b>	<b>Financial Review .....</b>	<b>8</b>
5.1.	Details of any Funds materially in deficit.....	8
5.2.	Policy on Reserves .....	8
5.3.	Principal sources of funding and outgoings.....	8
5.4.	Remuneration of Trustees .....	8
5.5.	Financial Status .....	8
5.6.	Statutory Statements on Liabilities.....	8
<b>6.</b>	<b>Statement of Financial Activity .....</b>	<b>9</b>
6.1.	Receipts and Payments accounts for the period ended 31 December 2024 ....	9
6.2.	Notes to the Accounts .....	11
<b>7.</b>	<b>Approval of the Board of Trustees.....</b>	<b>12</b>

## 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](mailto: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 £	
<b>A1 Receipts</b>						
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	
<b>Sub total(Gross income for AR)</b>	<b>15,661</b>	<b>9,800</b>	<b>-</b>	<b>25,461</b>	<b>18,103</b>	
<b>A2 Asset and investment sales, (see table). None</b>						
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	
<b>Total receipts</b>	<b>15,661</b>	<b>9,800</b>	<b>-</b>	<b>25,461</b>	<b>18,103</b>	
<b>A3 Payments</b>						
Administration	3,453	-	-	3,453	1,686	
Allotment	240	856	-	1,096	586	
Amblers refreshments	155	-	-	155	272	
Bridport Community	518			518		
Hospital Exhibition						
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
<b>Sub total</b>	<b>16,380</b>	<b>2,362</b>	<b>-</b>	<b>18,742</b>	<b>20,599</b>

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

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

<b>A5 Transfers between funds</b>					
None					

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

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

<b>B2 Other monetary assets</b>					
None					

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

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

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

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:

*Simon Hartley*

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.**