

APPLEWOOD FOUNDATION FOR SHARED LIVES

Charity Registration no. 1197147

Annual report of the trustees
for the period 15th December 2021 to 31st March 2023

Applewood Foundation for Shared Lives is a Charitable Incorporated Organisation first registered with the Charity Commission on 15th December 2021. The trustees have extended the first reporting period to 31st March 2023 to conform with the more general financial year.

Charity address: 28 Old Hospital Lawn, Stroud, GL5 4GA.

The first charity trustees: who are the only members of the foundation are:-
Mary Pearson
Nigel Harley
Julie Woods
Penelope Redman

Further trustees will be appointed in accordance with the rules of the foundation.

Objects:

The objects of the CIO are the relief of those in need, by reason of youth, age, ill-health, disability, financial hardship or other disadvantage, in particular but not exclusively by the provision of housing; and the promotion of social inclusion, in accordance with the principles of Rudolf Steiner.

Our aim in the first year of operating:

- ✚ To establish a Shared Lives house community under the auspices of Gloucestershire Shared Lives.
- ✚ To be active in the locality and establish a name for our charitable activity.
- ✚ To raise an initial sum towards the eventual purchase of a property
- ✚ To research suitable properties in the locality and explore the founding of a craft workshop.

Review of activities during the period:

We have been fortunate to have two houses made available to the foundation at no cost in which to establish the Shared Lives activity. 28 Old Hospital Lawn, the home of Judy & Ian Bailey has been a base for the Foundation, and 26 Old Hospital Lawn available for a Shared Lives carer to establish our first house community.

Initially Judy Bailey applied to and was accepted by Gloucestershire Shared Lives (GSL) for day activities, and this enabled us to attract an individual to apply to GSL as an ongoing carer. Gloucestershire Shared Lives were sufficiently impressed by the project to support the application of Julia Harley from Grange Village Camphill Community to move to Stroud and become the first supported individual of the Applewood Foundation in no. 26 Old Hospital Lawn.

The 'care & support' element of her living comes under the umbrella of GSL and is funded by the County Council. Her rent is covered by Housing Benefit. Establishing the daily routines and way of sharing lives together has been led by Judy Bailey mindful of our vision that everyone we offer support to is enabled to

live a fulfilling and socially inclusive life, both in their home setting and in their daily activities in the wider community.

Concurrent with the progress of the Shared Lives project Judy Bailey joined in with various community and craft related activities through the local Cashes Green Community Centre, initially as a trustee and later as a volunteer organiser. Together with the involvement of other local people a community café was set up which has enabled Applewood tenants to meet and integrate with the wider local community. More recently Tom Richmond from the Grange has been able to contribute by baking cakes on his one day a week visit to participate in Applewood Foundation activities.

Judy has pioneered a number of craft workshops at the community centre for local children as an anthroposophical social initiative in terms of the choice of crafts on offer and the quality of leadership. Applewood Foundation friends have played a part in organising an Advent market in the centre too.

The Wednesday allotment volunteer morning has also been a venue for social integration. Members of the Applewood households have 3 allotment plots and participate in the working of the community allotment plot. This attracted Tom Richmond who finds very little to do where he lives and through experiencing how Applewood Foundation generates community involvement opportunities has applied to move to Stroud and is searching for a flat in the area. Whether he might become a tenant of Applewood Foundation, or a friend involved in our activities remains to be seen.

We have also been having Marina Pearson, a good friend of Julia, to stay for holidays and weekly two-day visits. Marina has been the inspiration for our efforts to establish a weaving workshop locally. To date there is a regular Friday afternoon wool work session at no 28.

Partnering with other local social initiatives:

In the course of the above activities and in designing the weekly timetable of Applewood activity we have consciously gone out to participate in the programmes of other, often anthroposophically inspired, social initiatives active in the Stroud area. Julia's close engagement with Gannicox Camphill Community, Ruskin Mill Trust's Home Making Course, gardening at Hawkwood College and being active with the Barnwood trust are all examples of benefit to our members in this respect. We are also thankful for the support of these organisations towards our project.

Achievements to date:

The above activities taken as a whole, have been a success in terms of our vision that our house community members and friends are enabled to lead a fulfilling socially inclusive life and can play a role in facilitating and promoting social inclusion and community spirit in the neighbourhood.

We have not seriously engaged with fundraising yet. However, thanks to the generosity of several supporters we do have £235,000 in the deposit account. During the period we have viewed a number of houses in the locality and are still exploring what exactly we are looking for in terms of property, numbers of bedrooms, workshop space, garden potential and locality. There is some confidence that funds could be made available to purchase initially through a 'friends' network' should a suitable property present itself.

In the first year of operating Applewood Foundation has achieved, for the public good, the provision of two properties providing accommodation and socially inclusive activity in accordance with its Objects.

Future plans:

In August 2022 Alec Harrison our initial Shared Lives carer in no. 26 moved on and Judy & Ian became the ongoing carers of Julia, spreading themselves over two houses! A couple, Hannah & Darshan Robson and their daughter May Blossom have applied to become Shared Lives carers with a view to living at no. 26 and sharing the house with Julia. This is supported by GSL and should become a reality by mid-2023.

In terms of priorities the search for property is ongoing, as is the work of finding donors to commit to funding such an expansion should the opportunity arise.

The craft work as a vehicle for community involvement and meaningful therapeutic and productive activity has been a success and we are seeking a place where it can settle and grow. Various venues have been explored both as a stand-alone centre and in combination with a living arrangement. Progressing this is another priority for the coming year.

Finances:

Because the Foundation does not as yet own any property there has been very little financial activity to report on. A substantial initial donation has given us the encouragement to believe that our vision is manageable. The daily life and activities of Applewood 'carers' and 'tenants' is covered by self-employment with GSL and State Benefits so again there has been little for the Foundation to finance. The research and development of the Foundation's work has been through voluntary effort. We are thankful to all those who have supported, encouraged and helped us in our endeavours, financially, morally and socially.

Accounts have been drawn up for the period December 2021 to 31st March 2023 on a cash basis and independently examined.

The current account balance stands at £4,573 and the deposit accounts at £235,480

Reserves & Investment:

A reserves policy is uncalled for in terms of our revenue as there are no significant outgoings requiring a reserves policy as yet. There are no restricted funds. Donations are placed in an interest-bearing Charity Deposit Account. Funds do need to be available in the eventuality of our finding a property to purchase so time locking funds in investment is not considered appropriate at this moment in our development.

Ethos, strategy and policies:

The ethos of the Applewood Foundation is expressed in our Purpose and Vision document together with the picture of the Values & Aspirations of the Social Impulse standing behind the Foundation of the charity.

Our strategy is to evolve organically in response to what comes toward us in our wish to achieve some public good in relation to our objects of providing shared

living with support and social inclusion, particularly but not exclusively for individuals with special needs.

The charity has an Operational Management Handbook including our vision and management and policies covering Safeguarding, data protection, financial controls and business plan among other things.

Charity executive:

Applewood Foundation has not found it necessary to employ anyone in the first year of operation. At some future date a housing manager may be needed, but to date all the work of the Foundation has been carried out by trustees and volunteers. The current 'community' of the Applewood Foundation comprises of Judy & Ian Bailey, Julia Harley, Marina Pearson, Tom Richmond, Mary Pearson, Hannah and Darshan Robson. With thanks to Alec Harrison who pioneered the shared living arrangement.

Contact details:

Bank: Triodos Bank, Deanery Road, Bristol, BS1 5AS

Independent Examiner:

Project Advisors:

- 🚩 **Shared Living:** Gloucestershire Shared Lives team.
- 🚩 **Camphill Community:** Esk Valley Camphill Community, Camphill Families & Friends, Camphill Alliance, Association of Camphill Communities.
- 🚩 **Registering a charity and business planning:** Max Comfort, Elizabeth Devas of GlosHub.
- 🚩 **Local community involvement:** Cashes Green Community Centre, Applewood Estate Management Committee.



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

APPLEWOOD FOUNDATION FOR SHARED LIVES

On accounts for the year
ended

31 MARCH 2023

Charity no
(if any)

1197147

Set out on pages

1 AND 2

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31 March 2023.

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:

Date:

13/5/2024

Name:

Cinzia Hensley

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

FCA

Address:

BK Plus Limited

6 Manor Park Business Centre, Mackenzie Way, Cheltenham

Gloucestershire GL51 9TX

Section B**Disclosure**

Only complete if the examiner needs to highlight 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.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Applewood Foundation for Shared Lives

No 1197147

Receipts and payments accounts

CC16a

For the period
from

15-Dec-21

To

31-Mar-23

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations	235,000	-	-	235,000	-
Bank Interest	965	-	-	965	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<i>Sub total (Gross income for AR)</i>	235,965	-	-	235,965	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
<i>Sub total</i>	-	-	-	-	-
Total receipts	235,965	-	-	235,965	-
A3 Payments					
Governance	284	-	-	284	-
Charitable Activity	200	-	-	200	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<i>Sub total</i>	484	-	-	484	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
<i>Sub total</i>	-	-	-	-	-
Total payments	484	-	-	484	-
<i>Net of receipts/(payments)</i>	235,481	-	-	235,481	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
<i>Cash funds this year end</i>	235,481	-	-	235,481	-

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Triodos Deposit account	230,907	-	-
	Triodos Current account	4,574	-	-
		-	-	-
	Total cash funds	235,481	-	-

(agree balances with receipts and payments account(s))

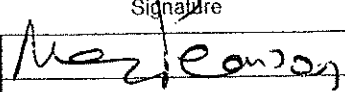
	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

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

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

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	M. MARY PEARSON	22.04.24



CHARITY COMMISSION FOR ENGLAND AND WALES

Independent examiner's report on the accounts

Section A

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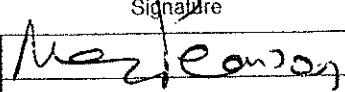
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		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

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

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			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

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B5 Liabilities			-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	M. MARY PEARSON	22.04.24