

APPLEWOOD FOUNDATION FOR SHARED LIVES

Charity Registration no. 1197147

2nd Annual report of the trustees
for the period 1st April 2023 to 31st March 2024

Applewood Foundation for Shared Lives is a Charitable Incorporated Organisation first registered with the Charity Commission on 15th December 2021. The trustees extended the first reporting period to 31st March 2023 so this constitutes the 2nd annual report.

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.

Our aim in the second year of operating:

-  To continue the Shared Lives activity and gain experience of what living arrangements work best and what sort of property is going to be most suitable.
-  To develop the craft workshop activity.
-  the search for property is ongoing, as is the work of finding donors to commit to funding such a development should the opportunity arise.

Review of activities during the period:

Two houses have remained 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.

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 applied to become Shared Lives carers with a view to living at no. 26 and sharing the house with Julia. This was supported by GSL and they and Julia set up home together at the beginning of September 2023. Sadly, the intensity of living with a young family became too much for Julia and she returned to 28 Old Hospital Lawn to the care of Judy & Ian at the beginning of November.

Trustees have learned much from the exit interviews and are currently reconsidering what might be a more suitable set up for the project in terms of living arrangements, what sort of person would be most suitable and the nature of the property.

Concurrent with the progress of the Shared Lives activity Judy Bailey has continued with various community and craft related activities through the local Cashes Green Community Centre. The Community Centre Thursday café, baking bread with children on Sunday mornings, felting, basketry, wool work and volunteering on the allotments together with hosting friends from Palestine having respite breaks in the UK have all generated a good name for the charity in the local community and fulfilled our purpose of creating social inclusion.

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 still not seriously engaged with fundraising. However, thanks to the generosity of several supporters we do have £266,000 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 second year of operating Applewood Foundation has achieved, for the public benefit, the ongoing provision of two properties providing accommodation and socially inclusive activity in accordance with its Objects.

Future plans:

Following the departure of Hannah and Darshan Julia has returned to the Shared Lives arrangement with Judy & Ian at no. 28 and we foresee this remaining the case for the time being.

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 there has been little for the Foundation to finance. The research and development of the Foundation's work has been through voluntary effort.

Although we haven't actively canvassed for donations during this period we are very grateful to the Trees of Rannoch Trust for their kind donation of £30,000 in May 2023. This has been transferred to the deposit account where it adds significantly to the reserve we carry for the eventual purchase of a property. Some may also be used in revenue to support the craft workshop activity which is striving to fulfil our object of community involvement as above.

We received a request for the return of a donation we had accepted in the first year. This was due to an immediate family member of the donor suffering a life changing diagnosis and needing financial support that was unexpected at the time of the donation being made. Trustees considered this request in the light of Charity Commission guidance on returning donations and accepted the humanitarian case for agreeing to this as the funds were in deposit and not immediately required for the charity's activity.

We are thankful to all those who have supported, encouraged, and helped us in our endeavours, financially, philosophically, and socially.

Accounts have been drawn up for the period 1st April 2023 to 31st March 2024 on a cash basis and independently examined.

At 31st March 2024 the current account balance is £97.99
and the deposit account £265,940.44

Reserves & Investment:

A reserves policy is not required 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 benefit 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. T

Contact details:

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

Independent Examiner: BKPlus, Cheltenham

Donors: Trees of Rannoch Trust

Project Advisors:

-  **Shared Living:** Gloucestershire Shared Lives team.
-  **Camphill Community:** Gannicox Camphill Community, Esk Valley Camphill Community, Camphill Families & Friends, Camphill Alliance, Association of Camphill Communities.
-  **Local community involvement:** Cashes Green Community Centre, Applewood Estate Management Committee. Gannicox Camphill Community.

Signed:

Ian Bailey
Executive volunteer

Mary Pearson
Chair

Date: 7th June 2024

Applewood Foundation					
Income & Expenditure 1st April 2023 - 31st March 2024					
Current account activity					2021-2023
INCOME		income	expenditure		
	donations	£ 30,000.00			£ 35,000.00
	William Morris craft income	£ 820.00			
	grants	£ -			
	Interest current a/c	£ 9.31			£ 57.80
EXPENDITURE					
Activities					
	Craft Activities		£ 93.29		
Governance					
	bank charges		£ 1.60		£0.70
	IT		£ 119.93		£115.75
	Camphill affiliation		£ -		£167.85
	transfer to deposit a/c		£ 30,000.00		£30,000.00
Misc.					
	Donation returned to sender		£ 5,000.00		
	leaving present H&D		£ 90.00		
		£ 30,829.31	£ 35,304.82		
surplus/deficit to date		-£ 4,475.51			
bank/cash contra transfer				31.03.2024	at bank
					Triodos Current £ 97.99
notes					Triodos Deposit £ 265,940.44
	Movement of funds				total at Bank £ 266,038.43
Deposit account					unbanked payins £ -
	deposits	£ 30,000.00			uncashed chqs £ -
	deposit interest,	£ 5,033.55		Book Balance 31.03.2024	£ 266,038.43
	surplus	£ 35,033.55		Book Balance 31.03.23	£ 235,480.39
current account				surplus/deficit in the year	£ 30,558.04
	deficit	-£ 4,475.51			
	movement in the year	£ 30,558.04			
Ian Bailey - Treasurer.					



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 2024

Charity no
(if any)

1197147

Set out on pages

1 to 6

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2024.

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:

11.12.2024

Name:

Cinzia Hensley

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

FCA

Address:

BK Plus Limited

6 Manor Park Business Centre, Mackenzie Way

Cheltenham 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

1197147

Receipts and payments accounts

CC16a

For the period
from

01-Apr-23

To

31-Mar-24

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	30,000	-	-	30,000	-
Bank Interest	5,043	-	-	5,043	-
Craft Activity Income	820	-	-	820	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	35,863	-	-	35,863	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	35,863	-	-	35,863	-
A3 Payments					
Craft Activities	94	-	-	94	-
Donation Returned	5,000	-	-	5,000	-
Administration	90	-	-	90	-
IT Costs	120	-	-	120	-
Bank Charges	2	-	-	2	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	5,306	-	-	5,306	-
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	5,306	-	-	5,306	-
Net of receipts/(payments)	30,557	-	-	30,557	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	235,481	-	-	235,481	-
Cash funds this year end	266,038	-	-	266,038	-

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	Tridos Deposit Account	265,940	-	-
	Tridos Current Account	98	-	-
		-	-	-
	Total cash funds	266,038	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
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 asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees		Signature	Print Name	Date of approval
		Ian Bailey	Ian Bailey	11/12/2024

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Contact details:

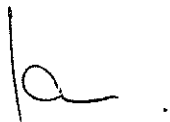
Bank: Triodos Bank, Deanery Road, Bristol, BS1 5AS

Independent Examiner:

Project Advisors:

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Signed:



Ian Bailey
Executive volunteer



Mary Pearson
Chair

Date: 7th June 2024