

APPLEWOOD FOUNDATION FOR SHARED LIVES

Charity Registration no. 1197147

3rd Annual report of the trustees
for the period 1st April 2024 to 31st March 2025

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 3rd 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 - retired December 2024
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.

in the third year

- ✚ the aim of recruiting younger people to become shared lives carers within the Applewood Foundation has not materialised and we have decided not to pursue this path for the time being.
- ✚ JH moved to Gannicox Camphill Community, in October 2024
- ✚ TR has continued to join us weekly on Wednesdays.
- ✚ Ian & Judy have remained registered with Shared Lives taking individuals for respite and day support.
- ✚ In terms of priorities the search for property has been 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 or in combination with a living arrangement. Progressing this is another priority for the coming year.
- ✚ Two houses have remained available to the foundation for the furtherance of the objects of the charity. 28 Old Hospital Lawn, the home of Judy & Ian Bailey has been a base for the Foundation, and 26 Old Hospital Lawn available for craft work sessions. As of February 2025 a rental is paid for the use of no.26 for the weekly craft activities.
- ✚ Concurrent with the Shared Lives activity and craft activity at no. 26 Judy Bailey has continued with various community and craft related activities through the local Cashes Green Community Centre & Berkeley House, the NHS centre nearby for learning disabilities and mental health care. The Community Centre Thursday café, baking bread with children on Sunday

mornings, felting, basketry, wool work, therapeutic painting 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:

Very much as last year the above activities and the weekly timetable of Applewood activity have consciously gone out to participate in the programmes of other, often anthroposophically inspired, social initiatives active in the Stroud area. JH's close engagement with Gannicox Camphill Community, Ruskin Mill Trust's Home Making Course, gardening at Hawkwood College are all examples of initiatives 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.

In the third 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.

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. Attending Shared Lives/Camphill conferences and the cost of craft activities being all there is to report on. 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, philosophically, and socially.

Accounts have been drawn up for the period 1st April 2024 to 31st March 2025 on a cash basis. Turnover being less than £25,000 independent examination has not been required.

At 31st March 2025 the current account balance is £4,130.93 and the deposit account £270,191.55

Reserves & Investment:

A reserves policy is not required in terms of our revenue as there are no significant outgoings for which a reserve is necessary 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.

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

Public Benefit

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 object of providing shared living with support and social inclusion, particularly but not exclusively for individuals with special needs. Our emphasis is however moving from facilitating shared living toward the provision of craft and other socially engaging activities with community building and social inclusion as the leading image.

Charity executive:

Applewood Foundation has not found it necessary to employ anyone as yet. 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.

Contact details:

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

Independent Examiner: BKPlus, Cheltenham

Donors in the period: Geraldine Lander, Analia Whitehead, Alliance for Camphill.

Project Partners:

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

Signed:

Ian Bailey
Executive volunteer

Mary Pearson
Chair

Date: 28th July 2025

 CHARITY COMMISSION FOR ENGLAND AND WALES	Applewood Foundation for Shared Lives			1197147		CC16a
	Receipts and payments accounts					
	For the period from		01/04/2024	To	31/03/2025	
Section A Receipts and payments						
	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						
Donations	2,933	-	-	2,933	30,000	
Bank Interest	7,256	-	-	7,256	5,043	
William Morris Craft activity	275	-	-	275	820	
	-	-	-	-	-	
	-	-	-	-	-	
	-	-	-	-	-	
	-	-	-	-	-	
	-	-	-	-	-	
Sub total (Gross income for AR)	10,464	-	-	10,464	-	
A2 Asset and investment sales, (see table).						
	-	-	-	-	-	
	-	-	-	-	-	
Sub total	-	-	-	-	-	
Total receipts	10,464	-	-	10,464	-	
A3 Payments						
Craft Activities	1,448	-	-	1,448	94	
IT Costs	125	-	-	125	120	
Independent Examination	600	-	-	600	-	
Bank Charges	7	-	-	7	2	
	-	-	-	-	-	
	-	-	-	-	-	
	-	-	-	-	-	
	-	-	-	-	-	
Sub total	2,180	-	-	2,180	216	
A4 Asset and investment purchases, (see table)						
	-	-	-	-	-	
	-	-	-	-	-	
Sub total	-	-	-	-	-	
Total payments	2,180	-	-	2,180	216	
Net of receipts/(payments)	8,284	-	-	8,284	-	216
A5 Transfers between funds	-	-	-	-	-	
A6 Cash funds last year end	-	-	-	-	-	
Cash funds this year end	8,284	-	-	8,284	-	216

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	270,191	-	-
	triodos Current account	4,131	-	-
		-	-	-
	Total cash funds	274,322	-	-
	(agree balances with receipts and payments account(s))	Agreement Error	OK	OK
	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
		Ian Bailey		20/11/2025