



ROOTED

Charitable Incorporated Organisation

Trustees' Annual Report and Financial Statements

For the year ended 29-11-2025

Registered Charity No: 1211196

Registered with the Charity Commission for England and Wales



1. Reference and Administrative Information

Charity Name	Rooted
Charity Registration No.	1211196
Legal Form	Charitable Incorporated Organisation (CIO)
CIO Constitution Type	Association CIO
Registered Address	56 Fore Street, Kingsand, Cornwall, PL10 1NA
Financial Year	29-11-24 to 29-11-25
Accounts Basis	Receipts & Payments

Trustees

The following served as trustees during the year and up to the date of approval of this report:

Name	Role	Appointed / Resigned
Jessica Stevens	Chair	Serving throughout
Gareth Adams	Trustee	Serving throughout
Demelza Carne	Trustee	Serving throughout
Damien Golder	Trustee	Serving throughout

Key Staff and Professional Advisers

Director	Daniel Alvarez
Independent Examiner	Wings Accountants, Unit 1, Pearl Assurance House, Elbow Lane, Tavistock, PL19 0BG
Bankers	Co-operative Bank, Skersmaldale, PO Box 250

2. Structure, Governance and Management

Legal Structure

The charity is a Charitable Incorporated Organisation (CIO), constituted under the Charities Act 2011 and registered with the Charity Commission for England and Wales. It is governed by its constitution, which was adopted on 29-11-2024 and has not been amended.

Rooted is a Charitable Incorporated Organisation constituted under the Association model, governed by its constitution adopted in accordance with the Charities Act 2011. The members of the CIO are the trustees. Decisions of the members are taken by simple majority vote at a general meeting or by written resolution. An Annual General Meeting must be held at intervals of not more than 16 months, at which the trustees' annual report and accounts are presented and trustees are elected.

As a CIO, the organisation is not registered at Companies House and is not subject to company law. The CIO has a single regulator: the Charity Commission for England and Wales.

Charitable Objects

The CIO's objects, as set out in its constitution, are:

The conservation, protection and improvement of the natural environment, in particular the wooded environment and landscape in the South West of England, for the public benefit.

The advancement of the education of the public in environmental and ecological matters, the use of woodlands and all species living within them, and in the subject of sustainable development.

How the Charity is Governed

The board of trustees manages the affairs of Rooted in accordance with Clause 12 of the constitution. Any trustee may call a meeting of the trustees, and decisions are taken by a simple majority of those present and eligible to vote. The quorum for trustee meetings is two trustees, or one third of the total number of trustees, whichever is greater. Trustees may also take decisions by written resolution agreed by a majority of all trustees within 28 days of circulation. Trustees may participate in meetings by electronic means. As the members of the CIO are the trustees, the AGM fulfils both the statutory membership meeting requirement and the board's annual review of accounts and governance. An AGM must be held at intervals of not more than 16 months, with at least 14 clear days' notice given to all trustees. The trustees may delegate powers to sub-committees, provided that at least one trustee sits on each committee and that all acts and proceedings are reported back to the full board.

Trustee Recruitment, Induction and Training

Trustees are recruited on the basis of the skills needed to further Rooted's charitable objects, with particular emphasis on expertise in woodland management, conservation, and charitable governance. Candidates are identified and approached directly by the existing board. Trustees are formally appointed by election in accordance with the constitution. No new trustees were appointed during the year. New trustees receive a copy of the constitution and the latest trustees' annual report and accounts upon appointment, as required by Clause 14 of the constitution. The trustees are committed to ongoing training and development and will access relevant training opportunities, including in areas such as woodland conservation, safeguarding, and charity governance, subject to the availability of funding.

Pay and Remuneration of Key Management Personnel

No trustee received any remuneration or expenses during the year with the exception of one trustee who received payment for services rendered to Rooted. This payment was made in accordance with Clause 6 of the constitution, which permits a trustee or connected person to enter into a contract for the supply of services to the CIO where permitted under sections 185 to 188 of the Charities Act 2011, and was made within the framework of a specific funded project. A majority of trustees were not in receipt of remuneration at the time the arrangement was approved.

The CIO's director received payment for the coordination and delivery of projects within the framework of specific funded projects. Pay for the director is set by the trustees and is determined by and contained within the budgets agreed as part of the relevant project funding, ensuring that remuneration remains reasonable and proportionate to the work undertaken.

Related Parties and Connected Organisations

The trustees are not aware of any related party transactions or connected organisations requiring disclosure.

3. Objectives and Activities

Aims and Objectives for the Year

During the year the trustees set objectives focused on three areas of activity, each directly linked to Rooted's charitable objects of conserving and improving the natural wooded environment in the South West and advancing public education in environmental and ecological matters.

The first objective was to bring people at risk of social exclusion and elderly people into woodland environments, providing meaningful access to nature for those who may otherwise be excluded from it. This work advances the conservation object, by connecting new audiences with the wooded environment, and the education object, by increasing public understanding of and engagement with woodlands and the species within them.

The second objective was to explore how technology can support the sustainability of community groups and charities operating in the environmental sector. This project examined practical tools and approaches to help environmental organisations become more resilient and effective, directly advancing public education in sustainable development as set out in Rooted's objects.

The third objective was to research the connection between woodland volunteering and health and wellbeing. This work sought to build the evidence base for the role of woodland environments in supporting individual and community health, contributing to public understanding of the value of the natural environment and strengthening the case for its conservation and protection.

Public Benefit

The trustees confirm that they have had due regard to the Charity Commission's guidance on public benefit when planning and reviewing the CIO's activities.

The CIO's charitable purposes are delivered for public benefit as follows:

Rooted's charitable purposes are the conservation, protection and improvement of the natural environment, in particular the wooded environment and landscape in the South West of England, and the advancement of public education in environmental and ecological matters, the use of woodlands and all species living within them, and the subject of sustainable development.

During the year Rooted carried out its purposes through three areas of project work. It delivered activities bringing people at risk of social exclusion and elderly people into woodland settings, providing direct access to the natural environment for groups who may otherwise be unable to benefit from it. It undertook work exploring how technology can support the sustainability of community groups and charities in the environmental sector, advancing public understanding of sustainable development in practice. It also carried out research into the connection between woodland volunteering and health and wellbeing, building the evidence base for the public benefit of engagement with the natural environment.

The trustees confirm that they have had due regard to the Charity Commission's guidance on public benefit when planning and reviewing Rooted's activities during the year, and are satisfied that all of the CIO's activities are carried out for the public benefit in furtherance of its charitable purposes.

Main Activities

During the year Rooted delivered five projects in furtherance of its charitable objects.

Active in the Woods, funded by Sport England, supported autistic children to access woodlands and take part in physical activity in a natural environment. The project was delivered in partnership with Beat 4 Autism and Wilder Me, specialist local groups based in the Rame Peninsula, and in collaboration with Pigshill and Clarrick Woods, Maker Woods (Rame Conservation Trust), and Antony Woodland Garden. Eight sessions were delivered during the year, engaging 35 children directly in outdoor physical activity in a woodland setting.

App Feasibility Study, supported by Cornwall Council, explored the development of a digital application to help small environmental groups and charities evidence their work and build organisational resilience. The project resulted in the creation of a clickable prototype and enabled the purchase of equipment to support the charity's ongoing operations. The primary beneficiaries were small environmental organisations in the region whose long-term sustainability and effectiveness the project aimed to strengthen.

Woodland Wisdom, funded by the National Lottery, delivered a programme of workshops and practical sessions focused on traditional woodland skills and woodland ecology for people aged 65 and over. The project is delivered in partnership with Pigshill and Clarrick Woods and Antony Woods, and in collaboration with Wild Edges and Wilder Me. During the year three workshops and three practical sessions were delivered, reaching 35 participants. The full programme of ten workshops and fifteen practical sessions has been fully allocated, demonstrating strong demand from the target group.

Woodland Ways, funded by the Cornwall Community Foundation, provided woodland-based sessions for people at risk of social exclusion. Participants had the opportunity to learn about traditional woodland management, tree identification and ecology, while benefiting from social connection and shared experiences in nature. The project aimed to reduce isolation and improve wellbeing among those who face barriers to participation in community life.

Woodland Wellbeing Research, supported by the NIHR Health Determinants Research Collaboration Cornwall, delivered woodland-based volunteering sessions as part of a research project exploring the relationship between volunteering in woodlands and health and wellbeing. A Community Researcher was engaged to support the research elements of the project, and 45 participants took part. The woodland partner for this project is Pigshill and Clarrick Woods. The research aims to build the evidence base for the health benefits of engagement with the natural environment, with findings intended to inform future practice across the sector.

Volunteers

Rooted relies significantly on the contribution of volunteers across all of its projects. During the year approximately 60 volunteers were involved in the charity's work, undertaking a wide range of activities including leading sessions, coordinating project delivery, carrying out practical woodland tasks, supervising participants, delivering workshops, and supporting the dissemination of research findings. Volunteers are central to Rooted's ability to deliver its charitable purposes and the trustees wish to record their sincere thanks to all those who gave their time during the year. The trustees themselves serve in a voluntary capacity and receive no remuneration for their work as trustees.

4. Achievements and Performance

Summary of Achievements

This has been an exciting and impactful year for Rooted, with five projects delivering meaningful outcomes for people and woodlands in Cornwall.

Active in the Woods brought 35 autistic children into woodland settings through eight sessions delivered in partnership with Beat 4 Autism and Wilder Me. The impact extended well beyond the children themselves — families and siblings benefited equally, with the woodland environment providing a welcoming and inclusive space for the whole family. Trustees and project partners observed marked improvements in children's physical confidence over the course of the sessions, reflecting the power of the natural environment to support the development of children who may face barriers to conventional physical activity.

The **App Feasibility Study** produced a clickable prototype of a digital tool designed to help small environmental charities and community groups evidence their work and become more sustainable. The prototype was very well received, with around 20 organisations providing feedback during the year. This level of engagement demonstrates a genuine and widespread need for practical digital support across the environmental sector. Rooted is now seeking funding to develop the application fully, with the ambition of making it available to environmental groups across the region.

Woodland Wisdom connected 35 people aged 65 and over with traditional woodland skills and ecology through workshops and practical sessions in partnership with Pigshill and Clarrick Woods and Antony Woods. The response from participants has been overwhelmingly positive — many got in touch directly with Rooted to express their gratitude and to share how practical and useful they found the sessions. Participants particularly valued learning together as a group, reflecting the social as well as educational benefits of shared experience in a woodland setting. The full programme has been allocated, demonstrating strong demand and the value placed on this kind of intergenerational outdoor learning.

Woodland Ways continued to provide woodland-based sessions for people at risk of social exclusion, offering opportunities to learn traditional woodland management skills, tree identification and ecology alongside time for social connection in nature. The project has attracted interest from a number of specialist schools, reflecting growing recognition of the value of woodland-based activity for people with additional needs and those facing barriers to participation in community life. Rooted looks forward to developing these relationships in the coming year.



The **Woodland Wellbeing Research project**, supported by the NIHR Health Determinants Research Collaboration Cornwall, has produced remarkable early findings. Of the 30 participants taking part in woodland volunteering sessions at Pigshill and Clarrick Woods, 72% reported benefits to their mental wellbeing. Perhaps most encouragingly, a number of participants have gone on to take up regular volunteering independently — a powerful indication that engagement with woodland environments can create lasting positive change in people's lives. These findings have the potential to make a significant contribution to the national evidence base for the health benefits of nature-based activity.

Across all five projects, Rooted's work this year has demonstrated the extraordinary potential of woodland environments to improve lives — building confidence, reducing isolation, supporting mental health, and connecting communities with the natural world on their doorstep.

Key Performance Indicators

As Rooted is in its early years of operation, formal numerical targets have not yet been established across all areas of activity. The table below therefore records performance against the key milestones and outputs set within each funded project, alongside emerging outcome data where available. The trustees intend to develop a more structured performance framework in the coming year.

Indicator	Target	Actual
Children engaged through Active in the Woods	35	35 ✓
Older adults engaged through Woodland Wisdom	Target cohort fully allocated	35, full programme allocated ✓
Woodland Wellbeing Research participants	45	30 ✓
Organisations providing feedback on app prototype	Sector engagement achieved	20 organisations ✓
Volunteers engaged across all projects	—	60
Participants reporting mental wellbeing benefits	—	72%
Sessions delivered (Active in the Woods)	20	8 (ongoing)
Sessions delivered (Woodland Wisdom)	25	6 (ongoing)

Challenges and Lessons Learned

The year presented several challenges which the trustees and staff have reflected on carefully.

Securing sufficient funding to sustain the charity's work required significantly more effort than anticipated. While Rooted successfully delivered five funded projects during the year, many more proposals and applications had to be developed and submitted to build a viable pipeline of future work. This placed considerable pressure on a small team already fully committed to project delivery. The trustees recognise that developing a sustainable funding pipeline is one of the most important strategic priorities for the coming year and intend to dedicate greater capacity to this area.

Balancing workload with real organisational capacity was an ongoing challenge throughout the year. Managing five concurrent projects, each with its own partners, funders, reporting requirements and participant groups, stretched the team's resources. Despite this, the quality of delivery remained high and results across all projects were excellent. The trustees acknowledge that careful workload planning will be essential as Rooted continues to grow.

Working with autistic children and young people through Active in the Woods brought its own challenges, as is inherent in this area of work. Rooted is committed to delivering high quality, sensitive and inclusive sessions and the trustees acknowledge that this requires ongoing learning, flexibility and close collaboration with specialist partners such as Beat 4 Autism and Wilder Me, whose expertise was invaluable throughout the year.

Weather presented a practical challenge to the delivery of outdoor sessions, affecting schedules across several projects. The trustees and staff responded by adapting plans where necessary to ensure that participants were not significantly disadvantaged. This experience has highlighted the importance of building flexibility into project planning and scheduling from the outset, and the trustees will ensure this is reflected in the design of future projects.

The trustees are satisfied that further funding will be sought to progress the app development to the next stage and regard the strong engagement from approximately 20 organisations during the feasibility study as a strong foundation on which to build.

5. Financial Review

Overview of Financial Performance

During the year ended 30 November 2025, Rooted received total income of £73,320, comprising £69,100 in grants (of which £5,000 was unrestricted and £64,100 was restricted to specific projects) and £4,220 in donations. This was the charity's first full year of operation and there was no comparative income in the prior year.

Total expenditure for the year amounted to £41,929, covering consultancy (£23,850), coordination (£10,500), legal fees (£4,200), workshops (£1,062), supervision (£900), equipment (£758), venue hire (£420), refreshments and fuel (£420), core costs (£454), and marketing (£19). All expenditure was incurred in direct furtherance of the charity's charitable objects.

The charity closed the year with a surplus of £31,391, held across two funds: £4,559 in unrestricted funds and £26,178 in restricted funds held for specific ongoing projects. The charity has one liability, being a personal loan of £4,200 relating to legal fees incurred in establishing the CIO. There are no investment assets. The trustees are satisfied that the charity is in a sound financial position for its stage of development.

Full details are set out in the receipts and payments accounts, prepared on the CC16a form in accordance with the Charities Act 2011.

Income

Income Source	This Year £	Last Year £
Donations and legacies	4,220	0
Grants from statutory bodies	30,000	0
Grants from charitable trusts / foundations	39,100	0
Income from charitable activities	-	-
Fundraising events and trading	-	-
Investment income	-	-
Other income	-	-
Total Income	73,320	0

Expenditure

Expenditure Category	This Year £	Last Year £
Expenditure on charitable activities	37,275	0
Fundraising costs	-	-
Governance costs	4,200	0
Other expenditure	454	0
Total Expenditure	41,929	0

Reserves Policy

As Rooted is in its first year of operation, the trustees have begun to develop a formal reserves policy. At the year end, free reserves stood at £4,559, representing the unrestricted fund balance. The restricted fund balance of £26,178 is not available as free reserves as it is committed to specific funded projects currently in delivery.

Principal Funding Sources and Financial Stability

Rooted's income in its first year was derived entirely from grants and donations, with no earned income. The principal funders during the year were Sport England, Cornwall Council, the National Lottery, the Cornwall Community Foundation, and the NIHR Health Determinants Research Collaboration Cornwall. The trustees are grateful for the support of all funders whose investment has made Rooted's work possible. The trustees recognise that reliance on project-specific restricted funding carries an inherent concentration risk and that securing unrestricted and multi-year funding is a strategic priority for the coming year. Work to develop a more diverse and resilient funding base is underway, including the development of a pipeline of future funding applications.

Going Concern

The trustees have reviewed the CIO's financial position, income projections and cash flow forecasts for the next 12 months. The trustees are satisfied that the CIO has adequate resources to continue operating for the foreseeable future and have therefore prepared the financial statements on a going concern basis. The trustees note that the charity's continued operation is dependent on securing further project funding and will continue to monitor the financial position closely throughout the coming year.

6. Plans for the Future

The trustees have identified the following priorities for the coming year, each directly linked to Rooted's charitable objects of conserving and improving the natural woodland environment and advancing public education in environmental and ecological matters.

Rooted will continue to deliver its three ongoing projects — Woodland Wisdom, Active in the Woods, and Woodland Ways — ensuring that the participants already engaged continue to benefit fully from the programmes and that all sessions are completed to the high standard established during the year.

Building on the strong interest generated by Woodland Ways, the trustees will seek further funding to expand the provision of woodland-based sessions for people at risk of social exclusion, including through developing relationships with specialist schools that have expressed interest in the programme. The trustees see significant potential to reach new groups and are committed to making woodland environments accessible to those who face the greatest barriers to participation.

Securing the next stage of funding to develop the digital app into a fully functioning tool remains a key priority. The trustees will actively explore funding opportunities and pursue partnerships with local organisations that could support the app's development and broaden its reach across the environmental sector. The feasibility study and prototype developed during the year provide a strong platform from which to approach funders and partners.

The trustees will pursue partnerships with larger local and regional organisations with the aim of accessing bigger and more complex projects that would extend Rooted's impact and strengthen the charity's long-term financial sustainability.

Rooted will continue to develop its involvement in research into the relationship between woodland environments and human health and wellbeing. Conversations are ongoing with a number of bodies and the trustees are committed to building on the remarkable early findings of the Woodland Wellbeing Research project to further the evidence base for nature-based health interventions.

The trustees recognise that the coming year will again require significant effort to secure sufficient funding to sustain and grow the charity's work. Competition for grant funding in the environmental and health sectors remains intense, and the trustees will prioritise the development of a robust and diversified funding pipeline. Weather and the inherent challenges of delivering outdoor programmes will continue to require flexible and responsive project planning. The trustees are confident that the partnerships, expertise, and track record established during Rooted's first year provide a strong foundation for the year ahead.



7. Statement of Trustees' Responsibilities

The trustees of Rooted are responsible for preparing the Trustees' Annual Report and the financial statements in accordance with applicable law and United Kingdom accounting standards.

Under charity law the trustees are required to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the CIO and of its incoming resources and application of resources during the year. In preparing those financial statements the trustees are required to:

- Select suitable accounting policies and apply them consistently;
- Observe the methods and principles of the Charities SORP (FRS 102);
- Make judgements and estimates that are reasonable and prudent;
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements;
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the CIO will continue in operation.

Jessica
Stevens

Stevens

Chair of Trustees

Date: 31/3/26

GARETH ADAMS
TRUSTEE

31/3/26 

Demelza Carne TRUSTEE
 31/3/26



CHARITY COMMISSION
FOR ENGLAND AND WALES

Rooted

1211196

CC16a

Receipts and payments accounts

For the period
from

29/11/2024

To

30/11/2025

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					
Grants	5,000	64,100	-	69,100	-
Donations	4,220	-	-	4,220	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	9,220	64,100	-	73,320	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	9,220	64,100	-	73,320	-
A3 Payments					
Consultancy	-	23,850	-	23,850	-
Coordination	-	10,500	-	10,500	-
Legal fees	4,200	-	-	4,200	-
Workshops	-	1,062	-	1,062	-
Supervision	-	900	-	900	-
Equipment	-	758	-	758	-
Core costs	454	-	-	454	-
Venue hire	-	420	-	420	-
Refreshments & fuel	-	420	-	420	-
Marketing	-	19	-	19	-
Sub total	4,654	37,929	-	42,583	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	4,654	37,929	-	42,583	-
Net of receipts/(payments)	4,566	26,171	-	30,737	-
A5 Transfers between funds	-	7	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	4,559	26,178	-	30,737	-

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	Co-operative Bank	4,559	26,178	-
		-	-	-
		-	-	-
		-	-	-
	Total cash funds (agree balances with receipts and payments account(s))	4,559	26,178	-
		OK	OK	OK

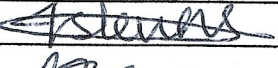
	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	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	Personal loan	Unrestricted	4,200	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval
	G. ADAMS	31/3/26
	Jess Stevens	31/3/26
	DEMELZA CARNE	31/3/26

Independent Examiner's Report to the Trustees of Rooted

I report on the accounts of Rooted for the year ended 30th November 2025.

Respective responsibilities of trustees (directors) and examiner

The organisation's trustees are responsible for the preparation of the accounts. They consider that an audit is not required for this year under Section 144(2) the Charities Act 2011 (the 2011 Act) and that an independent examination is needed. It is my responsibility to:

- Examine the accounts under section 145 of the 2011 Act
- To follow the procedures laid down in the general Directions given by the Charity Commission under section 145(5)(b) of the 2011 Act
- To state whether particular matters have come to my attention.

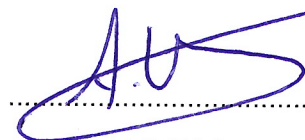
Basis of Independent Examiner's Statement

My examination was carried out in accordance with the General Directions given by the Charity Commissioners. An examination includes a review of the accounting records kept by the organisation and a comparison of the accounts presented with these records. It also includes consideration of any unusual items or disclosures in the accounts and seeking explanations from the trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently I do not express an audit opinion on the accounts.

Independent Examiner's Statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that in any material respect the requirements:
 - to keep accounting records in accordance with section 386 of the Companies Act 2006; and
 - to prepare accounts which accord with the accounting records, comply with the accounting requirements of section 396 of the Companies Act 2006 and with the methods and principles of the Statement of Recommended Practice: Accounting and Reporting by Charities have not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.



A Wing LLB FCA

31st March 2026

Date

(Fellow of the Institute of Chartered Accountants in England & Wales)

Wings Accountants Ltd, Unit 1, Pearl Assurance House, Elbow Lane, Tavistock, Devon PL19 0BG