

# **Community Foundation for Planetary Healing**

Also known as

## **The Planetary Healing Centre**

(A company limited by guarantee)

Scottish Charity No: SC034826

Company No: SC257126

### **Annual Report & Financial Statements**

**For the Period**

**6 October 2013 to 5 October 2014**

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**Annual Report & Statement of Account**

For the year 6 October 2013 to 5 October 2014

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**Trustees' Annual Report**

For the year 6 October 2013 to 5 October 2014

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The trustees (who are also the directors of the company for the purposes of company law) present their report together with the financial statements and the independent examiner's report for the year 6 October 2013 to 5 October 2014.

**Reference & Administrative Information**

**Charity and Company Name:** Community Foundation for Planetary Healing

**Also known as:** The Planetary Healing centre

**Charity Number:** SC034826

**Company Number:** SC257126

**Registered Office** Pirnie Ha', Cockburnhill Road, Balerno, Edinburgh EH14 7JB

**Principal Address:** 288 Portobello High Street, Edinburgh, EH15 2AS

**Trustees** Mark Halliday - Chairperson  
Cláudia Gonçalves – Treasurer  
Margot Daru-Elliot - acting Secretary  
Tessa McKirdy  
Mags Higgins

**Advisors /  
Council of Elders** Alma Shearer, Emily Boyd and Stewart Keith

**Company Secretary:** Margot Daru-Elliot (acting secretary)

**Independent Examiner:** Chris Smith BSc (Hons) ACIE

**Bankers** Royal Bank of Scotland  
540a Lanark Road  
Edinburgh EH14 5EL

**Trustees' Annual Report**

For the year 6 October 2013 to 5 October 2014

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**Structure, Governance & Management**

Governing Document

Community Foundation for Planetary Healing is a charitable, company limited by guarantee incorporated on 6 October 2003 and is governed by its Memorandum and Articles of Association.

Membership of the Foundation is open to all persons irrespective of age, sex, ethnicity, nationality, disability orientation, religion or beliefs who apply for membership and are approved by the Directors.

Appointment of Trustees

The Trustees, who are also the Directors of the Company, are elected by the membership at the AGM and serve for a maximum of five years when they retire from office. However, after their term of office has expired Trustees are eligible for re-election. The Trustees may at any time co-opt any person to be appointed as a Trustee to fill a vacancy in their number or as an additional Trustee, but a co-opted Trustee holds office only until the next AGM

Organisational Structure

The Trustees, who meet quarterly, are responsible for overseeing the running of the Company. A voluntary project coordinator is responsible for the day to day running of the charity.

Risk Review

The Trustees keep the risks the Trust is exposed to under review and have adopted a number of policies and procedures to, as far as possible, minimise those risks.

**Objectives & Activities**

The Community Foundation for Planetary Healing is an Edinburgh based Voluntary Organisation charity solely run by volunteers.

The charity was set up in 2003 and it grew from a small number of people who had the desire to help others in the community who were struggling with ill health, needing support and therapies but could not afford the full cost of complementary therapies. Today the Planetary Healing Centre has a team of nearly 30 volunteers supporting the Charity's work and all volunteers have a variety of background and experiences as holistic therapists.

The Charity's mission is to help people to re-gain their health, wellbeing, build their confidence, gain greater awareness and understanding of themselves. Users of the charity's projects are vulnerable adults and largely drawn from those living on state benefits, pensions, or very low income. The immediate challenges service users face include mental health condition, trauma, sleep issues, bereavement, stress, anxiety, unemployment, carer responsibilities, isolation, addiction issues, physical illness, disability, life-limiting illnesses such as cancer and others.

**Trustees' Annual Report**

For the year 6 October 2013 to 5 October 2014

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The Foundation achieved its overall aim through the following main activities this year:

**1) Holistic Health Project: Accessible Therapies**

This project runs during the day, it is aimed at people dealing with well-being issues who are hard to reach and find themselves in an economically disadvantaged position. The therapies complement orthodox medicine helping people regain control of their health and wellbeing when they find themselves going through challenging times with their physical, mental or emotional health. Users contact the charity themselves to register in the project and book therapies and some are referred by other health professional agencies. This project is by donation.

**2) Holistic Library: Self development**

**Promoting holistic living:** To raise awareness and promote holistic self development, the charity offers a library where the community can borrow from a collection of over 400 holistic books. A small donation given when borrowing a book supports this service. Library members can borrow up to 3 books at a time for a period of 3 weeks and can renew their books via telephone.

**3) Nature Connection: For Families and individuals**

This Project runs from a 20ft yurt in rented woodland near Balerno. It is aimed at having hard to reach families and individuals spending quality time together outdoors connecting with nature. It promotes and develops positive health and wellbeing through nature therapy, the provision of a wide range of educational and social outdoors activities as well as storytelling. The Yurt, which is fitted with a wood burning stove inside, can accommodate up to 22 people. This project is by donation.

**4) Community Initiative: Supporting volunteers and community**

To give something back to all volunteers who support the Planetary Healing Centre with their time and skills regularly, the charity offers its volunteers the use of its premises at a 50% of the normal costs of renting premises in Edinburgh. The volunteers then run their own private therapy work, classes, groups, workshops and trainings. This takes place in the evening and weekends outside the Holistic Health Project times and days. The work is aimed at the wider community in general who are looking to reach or keep a healthy balance within and getting to a place of vibrant well-being. Private clients contact the therapists, facilitators or trainers directly to book and the therapists or facilitators book space at the Planetary Healing Centre, travel to their homes or see them at other venues they also work from.

**Trustees' Annual Report**

For the year 6 October 2013 to 5 October 2014

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**Achievements & Performance**

The Planetary Healing Centre is celebrating 11 years of existence this financial year. The steady growth of the Holistic Health Project is a testimony to the popularity of its service with those in greatest need. For people in the community who face financial hardship, the charity has been delivering holistic therapies by donation and sometimes free of charge since Oct 2006 4 days a week.

**Monitoring and Evaluation**

This year, with grants from Awards for All, a consultant was commissioned to do an evaluation and assess the effectiveness of the Holistic Health Project in achieving its aims and to take suggestions and feedback to ensure that it remains a project closely guided by its service users and volunteers. Quantitative and Qualitative information was collated including the data from client registration forms and therapy appointment sheets.

A total of 354 people registered in the project over the years indicating a high level of need for the service. Out of that, this year alone, 81 people made appointments for therapies with 75 attending regular therapies. The average number of attendances per person was 5 over the year and the maximum was 23 sessions. Additionally an average 30 people each week attended regular evening classes, workshops, open days, fundraising events and trainings as part of the Community Initiative.

During this year, the Holistic Health Project was open to the public on 42 weeks, Monday to Thursday 10am -3pm, delivered 358 low cost sessions to people on benefits, pensioners or on low income. A further 51 sessions were organized for which people failed to attend (14%). This non attendance figure is comparatively low for community health projects and expected when vulnerability of the clients and the challenges facing them attending sessions are taken into account.

Therapies were offered for a suggested donation between £8 and £20 per session (the average actual donation being around £10). A comparable session privately would cost around £45 to £100.

**Volunteer Trainings and professional development**

The charity values its volunteers highly, holds the "Investing in Volunteers" awards since 2009 and offers support and supervision once a Month. This financial year, the Charity supported the professional development of 14 therapists and practitioners of holistic health interventions, 1 coordinator and 1 manager. Also of 3 new coordinators who joined the charity after summer. Volunteer induction training days were held a few times this year for new volunteers. Training includes the organisation's background, boundaries, health and safety, guidelines on working with vulnerable people, policies and procedures, etc. An outside consultant trained 3 receptionists and 1 coordinator on "Dealing with challenging clients and situations." Another training attended by 14 volunteers this year was entitled: "Volunteer therapists and clients at the Holistic Health Project." Thanks to grants received from EVOT and Awards for All, 2 volunteer therapists who have been with

the charity for years received £300 each for continuous professional development this year. Another 7 volunteers will also be able to receive between £150 to £300 for training in the coming year.

## **Community Foundation for Planetary Healing**

Scottish Charity No: SC034826

Company No: SC257126

### **Trustees' Annual Report**

For the year 6 October 2013 to 5 October 2014

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#### **Financial Review**

The Foundation received income totaling £25,738 (2013: £14,502) primarily from its charitable activities, grants, fundraising and donations. Expenditure for the year was £18,950 (2013: £15,019) which resulted in a surplus of £6,788 (2013: a deficit of £517).

At the 5 October 2014 the Foundation held funds totaling £10,046, £9,948 of which are restricted funds. At the 5 October the Foundation had no free reserves. It is the intention of the Trustees to build up and maintain £3,000 in free reserves to allow the Foundation to meet timing differences between receipts & payments and to allow for any exceptional or unforeseen expenditure.

The therapists services were donated free of charge and are estimated as having an equivalent value of around £25,200 with a significant additional amount donated in terms of free management and coordinator services £25,540 and £9,300 from trustees/ fundraisers input making up to a total of £60,040 equivalent. Finally the Holistic Health Project also benefited from premises, donated free of charge by the co-founders, worth £7,200 which makes the total in kind benefits to £67,240.

Service users of the Holistic Health Project donated between £8 and £20 with the average contribution received been around £10. Approximately 10% of the sessions were free given to those who were in acute need when they indicated that they could not afford the smallest contribution of £8.

There are about 37 Holistic Centres in Edinburgh, only the Planetary Healing Centre offers this type of Holistic Health Project offering therapies which are financially accessible. The project is totally unique in that all of the therapists are volunteers and people in financial hardship can be supported holistically. Costs of Therapies in Commercial private therapy Centres varies from £40 to £100.

The Charity received £ 9,848 from Awards for All and £ 2,000 from Edinburgh Voluntary Trust (EVOT).

Whenever there is space available and demand, the Charity rents the therapy rooms and workshop space for the wider public for £10 per hour in order to generate income. To its regular volunteers it is £5 per hour in order to support and give something back to them.

**Trustees' Annual Report**

For the year 6 October 2013 to 5 October 2014

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**Future Plans**

1. Our Holistic Health Project will continue to be open working with vulnerable people who have health issues and are restricted financially. We will continue to accept new users and will be open 42 to 44 weeks in 2015.
2. Another 7 volunteer therapists who have been with the charity for over 6 Months will receive between £150 to £300 each for training and professional development in the coming year.
3. In the coming year the charity will seek funds for a full time Manager to support the projects.
4. The Nature Connection project will run once a Month April to October in 2015.
5. The Community Yurt will be re-furbished with the grants received from Awards for All.
6. The Charity will seek funds to purchase its own premises in Edinburgh which is also wheel chair accessible.
7. We will have two Open days and fundraising events in 2015.
8. Planning and fundraising will start for a "Bee wise – Bee keeping" Pilot Project in the coming year aimed at education on the importance of sustainable bee keeping and to teach bee-keeping in the community.



**Trustees' Annual Report**

For the year 6 October 2013 to 5 October 2014

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**Statement of Trustees' Responsibilities**

Company law requires the trustees to prepare financial statements for each financial year that give a true and fair view of the state of affairs of the charity at the end of the year and of the incoming and outgoing resources for the year then ended. In preparing those financial statements, the trustees are required to:

- select suitable accounting policies and apply them consistently,
- make judgments and estimates that are reasonable and prudent, and
- prepare the accounts on a going concern basis unless it is inappropriate to presume that the charity will continue its activities.

The trustees are responsible for keeping proper accounting records that disclose with reasonable accuracy at any time the financial position of the charity and to enable them to ensure that the financial accounts comply with the Companies Act 2006 and the Charities and Trustee Investment (Scotland) Act 2005. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

This report has been prepared in accordance with the provisions for small companies under part 15 of the Companies Act 2006, was approved by the Trustees on 15<sup>th</sup> of December 2014 and signed on their behalf by:

.....

Claudia Goncalves, Treasurer

**Independent Examiner's Report**

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I report on the financial statements of the charity for the financial period 6 October 2013 to 5 October 2014 that are set out on pages 11 to 16.

**Respective responsibilities of trustees and examiner**

The charity's trustees are responsible for the preparation of the accounts in accordance with the terms of the Charities and Trustee Investment (Scotland) 2005 and the Charities Accounts (Scotland) Regulations 2006. The charity trustees consider that the audit requirement of Regulation (10)(1)(a) to (c) of the 2006 Accounts Regulations does not apply.

It is my responsibility to examine the accounts under section (44)(1)(c) of the Act and to state whether particular matters have come to my attention.

**Basis of Independent Examiner's Statement**

My examination is carried out in accordance with Regulation 11 of the 2006 Accounts Regulations. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeks 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 view given by 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 44(1)(a) of the 2005 Act and Regulation 4 of the 2006 Regulations; and
  - to prepare accounts which accord with the accounting records and comply with the Regulation 8 of the 2006 Regulations

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.

**Chris Smith BSc (Hons) ACIE**  
**Glascairn Cottage**  
**Aytounhill**  
**Cupar**  
**KY14 6JH**

**Signed:**

**Date:**

**Statement of Financial Activities**

(Incorporating Income & Expenditure Account)

For the year 6 October 2013 to 5 October 2014

	Note	Unrestricted Funds £	Restricted Funds £	2014 Total £	2013 Total £
<b>Incoming Resources</b>					
From generated funds					
Voluntary Income	5	7,486	11,848	19,334	8,397
Activities for generating funds	6	1,538	-	1,538	1,974
Investment income		1	-	1	-
From charitable activities	7	4,726	-	4,726	3,748
Other incoming resources		139	-	139	383
Total incoming resources		<u>13,890</u>	<u>11,848</u>	<u>25,738</u>	<u>14,502</u>
<b>Resources Expended</b>					
Cost of generating funds	8	1,254	-	1,254	259
Cost of charitable activities	9	15,302	2,000	17,302	14,400
Governance costs		394	-	394	360
Total resources expended		<u>16,950</u>	<u>2,000</u>	<u>18,950</u>	<u>15,019</u>
<b>Net incoming/(outgoing) resources</b>		<u>(3,060)</u>	<u>9,848</u>	<u>6,788</u>	<u>(517)</u>
<b>Reconciliation of Funds</b>					
Funds brought forward		3,158	100	3,258	3,775
Net income		<u>(3,060)</u>	<u>9,848</u>	<u>6,788</u>	<u>(517)</u>
Funds carried forward		<u>98</u>	<u>9,948</u>	<u>10,046</u>	<u>3,258</u>

The statement of financial activities includes all gains and losses recognised in the period. All incoming resources and resources expended derive from continuing activities. The statement of financial activities also complies with the requirements for an income and expenditure account under the Companies Act 2006. The notes on pages 13 to 16 form an integral part of these accounts.

**Balance Sheet**

As at 5 October 2013

	Note	Unrestricted Funds	Restricted Funds	2014 Total	2013 Total
		£	£	£	£
<b>Fixed Assets</b>					
Tangible assets	10	1,217	-	1,217	2,434
<b>Current Assets</b>					
Debtors		84	-	84	-
Cash at bank & in hand		(470)	9,948	9,478	1,321
Total current assets		<u>(386)</u>	<u>9,948</u>	<u>9,562</u>	<u>1,321</u>
<b>Current Liabilities</b>					
Creditors		339	-	339	150
Accruals		394	-	394	347
Total current liabilities		<u>733</u>	<u>-</u>	<u>733</u>	<u>497</u>
<b>Net current assets</b>		<u>(1,119)</u>	<u>9,948</u>	<u>8,829</u>	<u>824</u>
<b>Net assets</b>		<u>98</u>	<u>9,948</u>	<u>10,046</u>	<u>3,258</u>
<b>Funds of the Charity</b>					
Unrestricted funds		98	-	98	3,158
Restricted funds		-	9,948	9,948	100
Total Funds		<u>98</u>	<u>9,948</u>	<u>10,046</u>	<u>3,258</u>

The directors confirm that for the financial period ended 5 October 2014:-

- the company was entitled to exemption under section 477 of the Companies Act 2006, and
- no members have required the company to obtain an audit of its accounts for the year in question in accordance with section 476 of the Act.

The directors acknowledge their responsibilities for complying with the requirements of the 2006 Companies Act with respect to accounting records and the preparation of accounts.

The accounts have been prepared in accordance with the provisions applicable to companies subject to the small companies' regime of the 2006 Companies Act. The notes on pages 13 to 16 form an integral part of these accounts.

Approved by the trustees on 15<sup>th</sup> December 2014 and signed on their behalf by:

.....  
Claudia Goncalves, Treasurer

**Notes to the Financial Statements**

For the year 6 October 2013 to 5 October 2014

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**1 Basis of Preparation**

**1.1 Basis of accounting**

These accounts have been prepared on the basis of historic cost in accordance with:-

- (a) Accounting & Reporting by Charities – Statement of Recommended Practice (SORP 2005),
- (b) Financial Reporting Standard for Smaller Entities (FRSSE) (Effective April 2008),
- (c) The Companies Act 2006
- (d) The Charities & Trustee Investment Act (Scotland) Act 2005, and
- (e) The Charities Accounts (Scotland) Regulations 2006 as amended.

The Charity has no investments that require to be reported at market value.

**2 Accounting Policies**

**2.1 Form of Financial Statements**

- (a) Unrestricted funds are those that may be used at the discretion of the trustees in furtherance of the objects of the charity. The trustees maintain one general unrestricted fund for the day-to-day running of the charity.
- (b) Restricted funds may only be used by specific purposes. Restrictions arise when specified by the donor or when funds are raised for specific purposes. See note 4 for details of the restricted funds held by the charity.

**2.2 Incoming Resources**

- (a) Incoming resources are recognised and included in the Statement of Financial Activities (SOFA) when the charity becomes entitled to the resources; the trustees are virtually certain they will receive the resources and the monetary value can be measured with sufficient reliability.
- (b) Where incoming resources have related expenditure the incoming resources and related expenditure are reported gross in the SOFA.
- (c) Grants received in advance and which specifically relate to a future accounting period are treated as deferred income.

**2.3 Expenditure & Liabilities**

- (a) Expenditure is accounted for on an accruals basis.
- (b) Liabilities are recognised as soon as there is a legal or constructive obligation to pay out resources.
- (c) Governance costs include the costs of preparation and examination of the statutory accounts, the cost of trustee meetings and the cost of any legal advice to trustees on governance or constitutional matters

**Notes to the Financial Statements**

For the year 6 October 2013 to 5 October 2014

**2.4 Assets**

Tangible fixed assets are capitalized if they have a value greater than £250 and can be used for more than one year. They are valued at cost or, if gifted, at their value on receipt.

**2.5 Depreciation**

Depreciation is calculated on a straight line basis to write off the cost of tangible assets over their useful economic life as follows:

Heaters, laptop, therapy benches and Yurt – 20%

**2.6 Taxation**

The charity is not liable to income or capital gains tax on its charitable activities. Irrecoverable VAT is included in the asset cost or expense to which it relates.

**3 Trustee Remuneration & Expenses**

No remuneration was paid to any trustees (Nil in previous year)

Out of pocket expenses totaling £435 were reimbursed to two charity trustees (Nil in previous year)

**4. Movement in Restricted Funds**

During the year the charity maintained the following restricted income funds:

	Opening balance	Income	Expenditur e	Transfer s	Closing balance
	£	£	£	£	£
Children's Project in Brazil	100	-	-	-	100
Volunteer expenses & Training - EVOT	-	2,000	2,000	-	-
Holistic Health Project - Awards for All	-	9,848	-	-	9,848
<b>Total</b>	<u>100</u>	<u>11,848</u>	<u>2,000</u>	<u>-</u>	<u>9,948</u>

**Notes to the Financial Statements**

For the year 6 October 2013 to 5 October 2014

<b>5. Voluntary Income</b>	<b>Note</b>	<b>Unrestrict ed Funds</b>	<b>Restricted Funds</b>	<b>2014 Total</b>	<b>2013 Total</b>
		<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Donations		7,486	-	7,486	8,397
Edinburgh Voluntary Organisations Trust		-	2,000	2,000	-
Awards for All		-	9,848	9,848	-
Total		<u>7,486</u>	<u>11,848</u>	<u>19,334</u>	<u>8,397</u>

<b>6. Activities for Generating Funds</b>	<b>Note</b>	<b>Unrestrict ed Funds</b>	<b>Restricted Funds</b>	<b>2014 Total</b>	<b>2013 Total</b>
		<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Shop sales		330	-	330	353
Various events		1,208	-	1,208	1,621
Total		<u>1,538</u>	<u>-</u>	<u>1,538</u>	<u>1,974</u>

<b>7. Incoming Resources from Charitable Activities</b>	<b>Note</b>	<b>Unrestrict ed Funds</b>	<b>Restricted Funds</b>	<b>2014 Total</b>	<b>2013 Total</b>
		<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Holistic Health Project		2,784	-	2,784	3,152
Community Initiative (space rental)		1,942	-	1,942	596
Total		<u>4,726</u>	<u>-</u>	<u>4,726</u>	<u>3,748</u>

<b>8. Cost of Activities for Generated Funds</b>	<b>Note</b>	<b>Unrestrict ed Funds</b>	<b>Restricted Funds</b>	<b>2014 Total</b>	<b>2013 Total</b>
		<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Cost of fundraising		1,254	-	1,254	259
Total		<u>1,254</u>	<u>-</u>	<u>1,254</u>	<u>259</u>

**Notes to the Financial Statements**

For the year 6 October 2013 to 5 October 2014

<b>9. Cost of Charitable Activities</b>	<b>Note</b>	<b>Unrestricted Funds</b>	<b>Restricted Funds</b>	<b>2014 Total</b>	<b>2013 Total</b>
		£	£	£	£
Community Initiative & Health Project		754	1,280	2,034	1,228
Training		-	720	720	-
Administration		2,446	-	2,446	1,940
Establishment		9,525	-	9,525	9,246
Publicity		204	-	204	160
Other costs		1,156	-	1,156	609
Depreciation		1,217	-	1,217	1,217
Total		<u>15,302</u>	<u>2,000</u>	<u>17,302</u>	<u>14,400</u>

**10. Tangible Assets**

	<b>Equipment and Yurt</b>
	£
<b>Cost</b>	
At 6 October 2013	7,686
Additions	-
At 5 October 2014	7,686
<b>Depreciation</b>	
At 6 October 2013	5,252
Charge for the year	1,217
At 5 October 2014	6,469
<b>Net book value</b>	
At 5 October 2014	1,217
At 6 October 2013	2,434