

# **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 2014 to 5 October 2015**

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# Community Foundation for Planetary Healing

## Annual Report & Statement of Account

For the year 6 October 2014 to 5 October 2015

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# Community Foundation for Planetary Healing

## Trustees' Annual Report

For the year 6 October 2014 to 5 October 2015

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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 2014 to 5 October 2015.

### Reference & Administrative Information

<b>Charity and Company Name:</b>	Community Foundation for Planetary Healing
<b>Also known as:</b>	The Planetary Healing centre
<b>Charity Number:</b>	SC034826
<b>Company Number:</b>	SC257126
<b>Registered Office</b>	Pirnie Ha', Cockburnhill Road, Balerno, Edinburgh EH14 7JB
<b>Principal Address:</b>	288 Portobello High Street, Edinburgh, EH15 2AS
<b>Trustees</b>	Mark Halliday - Chairperson Claudia Goncalves – Treasurer Margot Daru-Elliot - acting Secretary Tessa McKirdy Mags Higgins
<b>Advisers</b>	Alma Shearer, Emily Boyd and Stuart Keith
<b>Company Secretary:</b>	Margot Daru-Elliot (acting secretary)
<b>Independent Examiner:</b>	Chris Smith BSc (Hons) FCIE
<b>Bankers</b>	Royal Bank of Scotland 540a Lanark Road Edinburgh EH14 5EL

# Community Foundation for Planetary Healing

## Trustees' Annual Report

For the year 6 October 2014 to 5 October 2015

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### **Structure, Governance & Management**

#### Governing Document

Community Foundation for Planetary Healing is a registered charity and a 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. Four voluntary coordinators are responsible for the day to day running of the projects under the supervision of a volunteer manager.

#### 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**

During this current financial year, the charity celebrated 12 years of excellence and being recognised as a leading provider of Holistic Health care in Edinburgh. It strives to provide the best practice, education and promotion of holistic approach to health and wellbeing.

The organisation's charitable services support people decrease stress, prevent illnesses, improve confidence and self-esteem. It provides support, sense of belonging and community and also prevents people from developing future mental health issues.

The main focus of the charity's work is to support holistically people and families that are struggling with their health and wellbeing and are in a disadvantaged financial condition. They tend to come from deprived areas of Edinburgh. Those living in these precarious areas experience the highest levels of deprivation and suffering.

# Community Foundation for Planetary Healing

## Trustees' Annual Report

For the year 6 October 2014 to 5 October 2015

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The aim is to help people re-gain control of their physical, mental and social health; build their confidence; gain greater awareness and understanding of themselves and to help them live a fulfilling life.

The people whom the projects serve are the elderly, the impoverished, careers and people with ill-health. They tend to be on benefits, pensioners or with low to no income. They come seeking help, bringing with them a wide range of challenges, among which, poor mental health, trauma, sleep issues, bereavement, stress, anxiety, unemployment, career responsibilities, physical acute or chronic pain, isolation, addictions, disabilities and life-threatening illnesses such as cancer and other conditions aggravated by their financial status. This group face many challenges and disadvantages in comparison with more affluent members of society and are less likely to be able to access therapies which can assist with managing their health and wellbeing.

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

**HOLISTIC HEALTH PROJECT** – The Community based Holistic Health Project is a wonderfully warm hearted project, offering support to people who are struggling with the twin challenges of poor health and low or no income. It offers 30 types of Holistic Therapies, all complementary to services clients receive from the NHS. People are given an opportunity to sign up for therapies which they feel most drawn to and if they have children, to come for the nature therapy programme. This project is based on the belief that effective holistic approaches combined with orthodox medicine enable individuals to regain and maintain optimal health much quicker.

This project is unique in that all members of staff are volunteers, and sessions are offered on a donation basis. If beneficiaries cannot afford a donation, they access the project for free. The charity insists on its services being accessible to all that need it. Therapies are provided for a small suggested donation between £8 and £20 according to what user can afford to donate and often for free. This is 20% of what private therapies costs which is between £40 and £100 per session.

The number of registered users in the Holistic Health Project has risen from 50 to 405 since it first started most of whom self refer through word of mouth or through the “Edspace” website. Doctors are also referring people to the project. In the 12 months covered by this report 112 people accessed the Holistic Health project regularly in the year.

The people accessing the project are often in acute distress when they come to the charity and in acute need with ill-health. They are very vulnerable and largely drawn from those living on state benefits, pensions, or very low income. Within a couple of weeks after contacting the charity, users have access to 6 months to a year of support. What the project offers is an ethos of supporting individuals to take charge of their own health, wellbeing and recovery.

## Community Foundation for Planetary Healing

### Trustees' Annual Report

For the year 6 October 2014 to 5 October 2015

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The charity offers a service where money is no barrier and those struggling with ill health and financially can enjoy the support that is usually only the privilege of the better off.

**NATURE CONNECTION FOR FAMILIES** - In 2012, the charity started the Nature Connection for Families with children up to the age of 16 yrs old. The project provides opportunities for families to participate in a wide range of outdoors activities that enhance their wellbeing. It serves, not only families users of our Holistic Health Project, but also other disadvantaged families from Edinburgh and other areas in Scotland that are struggling financially and dealing with ill-health.

Providing free means of transportation with a mini bus to and from the project, this makes access easier for families to come closer to nature. During the current financial year, the project offered a variety of activities, which include: storytelling; conversations and games about bees; walking meditation; nature games; wilderness exploration and preservation; trust walks, which gently introduce the family and friends to each other and to the wonders around: nature therapy.

Nature Connection helped families to leave their stressful environment, a state of isolation and depression to connect with nature for health and wellbeing. This was achieved by creating conditions that ultimately led to integration, relaxation, positive changes in people's lives and in the community. Participants achieved physical wellbeing and positive mental health and a healthier lifestyle. The project received referrals from Dr Bell's Family Centre, One Parent Scotland and Making It Work. 2 support workers came from their organisation's to support the families.

**THE PLANETARY BEE PROJECT** – The charity is proud of its new project focusing on bees. These creatures, essential to our survival and responsible for pollinating countless plants, are so much under stress. Due to environmental changes, diseases and the usage of pesticides, their numbers are plummeting around the world. The new project establishes a strong bee community at the woodland in Balerno and permits them to live life as closely as possible to their natural rhythm. Rather than producing honey or renting our hives for pollination purposes, we allow the bees to do what they do best: tend nature in their own way at their own pace.

**HOLISTIC TRAINING** – The charity offered throughout the year short courses which are run by a team of therapists. Some training courses are offered throughout the year, such as Reiki and Transformational Breath, while others are offered twice a year, such as Crystal Healing Training and Feather Stone Energy Healing. In the coming year it is also intended to offer massage courses.

**VOLUNTEERING PROGRAMME** – The highly respected volunteering programme helps qualified therapists, including former service users, increase their confidence in their professional practice and gain more experience by offering beneficiaries holistic support, thus contributing to a stronger, more resilient and supportive community.

# Community Foundation for Planetary Healing

## Trustees' Annual Report

For the year 6 October 2014 to 5 October 2015

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### Achievements & Performance

The Holistic Health Project was open for 42 weeks and supported 112 people who had health issues and were financially restricted. The project delivered 305 holistic therapy sessions. The latest evaluation showed that 79% of people interviewed reported lasting improvements to aspects of their health and wellbeing subsequent to attending therapies with the project. Many reported multiple benefits across a wide range of issues.

The Nature Connection for Families ran between April and October and delivered 10 Friday sessions. 26 families composed of 28 adults and 35 children were helped; these families were financially restricted or on benefits. Several referrals were received: from Dr. Bells Family Centre in Leith, from One Parent Scotland, Making It Work and self referral from various families from the holistic community also took part on the programme.

The Community Yurt was refurbished, the Nature Connection was health within this space, and a few times it was rented out to members of the community for workshops in order to help pay for core costs.

In April, the charity had a Planning Day. All volunteers came together to envision and dream a self-sustainable Planetary Healing Centre which has its own building and land. The dream is beginning to manifest and the charity is already taking a few steps towards self-sustainability by looking into setting up a holistic shop in Portobello soon.

In June 2015, Luisa Gonzales donated a bee hive to the Charity. The hive has been held in the woodland in Balerno. They are testing a more natural method of bee keeping called the Peroni Method and this is a pioneer project in Scotland. Co-founder Claudia Goncalves is also chairing and supporting the Bee Forum in Edinburgh.

In 2015, 9 of volunteers were supported with training worth £150 to £300 each with grants received from Awards for All. Plus 11 Induction training was delivered for the new volunteers who joined the projects in 2015.

A dialogue with the Royal Edinburgh Hospital has been initiated in order to extend the volunteer services to their patients. In this coming year, the charity hopes to be able to further the relationship with the Royal Edinburgh Hospital and start delivering hand and feet massage in the hospital too.

To support the private therapies service, an online booking system was created which has been fully operational since Oct 2015.

# Community Foundation for Planetary Healing

## Trustees' Annual Report

For the year 6 October 2014 to 5 October 2015

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### **Financial Review**

The charity managed to keep the costs of the services to a minimum thanks to the generosity of the volunteer team which, in this year's account contributed in kind a total of £75,404.50. This was made up of £40,320 (therapists), Management (£24,500), Day to day coordination (£12,800), Board of Trustees and fundraisers (£10,300) plus £2,460 in kind by volunteer of the Nature Programme. The project therapy in Portobello also benefits from the donation of rent free premises equivalent to £9,500 per annum from the co-founders. This has been accounted for as a donation with an equivalent notional expenditure on rent.

In the 12 Months covered by this report, the charity received income totaling £24,946 (2014: £25,738), primarily from its charitable activities, grants, fundraising and donations. The total expenditure was £31,611 (2014: £18,950) which resulted in a surplus of £6,665 (2014: £6,788).

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. At the 5 October 2015 the Foundation held free reserves (the unrestricted funds less the value of tangible assets not readily available to be spent) of £1,021 and had not met their target.

A percentage of the Holistic Health Project sessions were given free to those who were in acute need when they indicated that they could not afford the smallest donation. The charity is the only holistic centre in Edinburgh that offers therapies under £20 to those restricted financially, which makes the project unique in Scotland.

### **Future Plans**

1. Create a new programme called "Employees Wellness". The idea is to begin a partnership between other charities, private companies and the Planetary Healing Centre, in order to offer a day of holistic therapies to their employees with the objective of supporting those who work in stressful environments. Income generated with this service will help support the core costs of the charitable work.
2. Further develop the Nature Connection Programme into a longer programme for families.
3. Develop a social media marketing plan, which will grow the online presence and social media activity.
4. Recruit more trustees to support the charity in 2016.

## Community Foundation for Planetary Healing

### Trustees' Annual Report

For the year 6 October 2014 to 5 October 2015

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5. Seek funds for a part-time project development worker and also a part-time administrator.
6. Continue to develop the bee project and amalgamate it with the Nature Connection Programme.
7. The focus for the year ahead is to continue to work supporting those who find themselves with health and wellbeing issues specially those in a critical financial circumstance.
8. The charity intends to become more self-sustainable by setting up a holistic shop to support its charitable work and promote private therapies and employees' wellness programme.
9. They will also continue establishing partnerships with Dr. Bells Families in Leith and the Royal Edinburgh Hospital and seek to establish new partnerships.

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 February 2016 and signed on their behalf by:

.....  
Claudia Goncalves, Treasurer

# Community Foundation for Planetary Healing

## Independent Examiner's Report

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I report on the financial statements of the charity for the financial period 6 October 2014 to 5 October 2015 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) FCIE  
Glascairn Cottage  
Aytounhill  
Cupar  
KY14 6JH

Date:

## Community Foundation for Planetary Healing

### Statement of Financial Activities (Incorporating Income & Expenditure Account)

For the year 6 October 2014 to 5 October 2015

	Note	Unrestricted Funds	Restricted Funds	2015 Total	2014 Total
		£	£	£	£
<b>Incoming Resources</b>					
From generated funds					
Voluntary Income	5	10,244	4,752	14,996	19,334
Activities for generating funds	6	3,266	-	3,266	1,538
Investment income		2	-	2	1
From charitable activities	7	5,271	-	5,271	4,726
Other incoming resources		1,411	-	1,411	139
Total incoming resources		<u>20,194</u>	<u>4,752</u>	<u>24,946</u>	<u>25,738</u>
<b>Resources Expended</b>					
Cost of generating funds	8	233	-	233	1,254
Cost of charitable activities	9	18,660	12,324	30,984	17,302
Governance costs		394	-	394	394
Total resources expended		<u>19,287</u>	<u>12,324</u>	<u>31,611</u>	<u>18,950</u>
<b>Net incoming/(outgoing) resources before transfers</b>		<u>907</u>	<u>(7,572)</u>	<u>(6,665)</u>	<u>6,788</u>
Transfers		998	(998)	-	-
<b>Net incoming/(outgoing) resources after transfers</b>		<u>1,905</u>	<u>(8,570)</u>	<u>(6,665)</u>	<u>6,788</u>
<b>Reconciliation of Funds</b>					
Funds brought forward		98	9,948	10,046	3,258
Net income		<u>1,905</u>	<u>(8,570)</u>	<u>(6,665)</u>	<u>6,788</u>
Funds carried forward		<u>2,003</u>	<u>1,378</u>	<u>3,381</u>	<u>10,046</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.

# Community Foundation for Planetary Healing

## Balance Sheet

As at 5 October 2015

Note	Unrestricted Funds	Restricted Funds	2015 Total	2014 Total
	£	£	£	£
<b>Fixed Assets</b>				
Tangible assets	982	-	982	1,217
<b>Current Assets</b>				
Debtors	194	-	194	84
Cash at bank & in hand	1,221	2,215	3,436	9,478
Total current assets	1,415	2,215	3,630	9,562
<b>Current Liabilities</b>				
Creditors	-	837	837	339
Accruals	394	-	394	394
Total current liabilities	394	837	1,231	733
<b>Net current assets</b>	1,021	1,378	2,399	8,829
<b>Net assets</b>	2,003	1,378	3,381	10,046
<b>Funds of the Charity</b>				
Unrestricted funds	2,003	-	2,003	98
Restricted funds	-	1,378	1,378	9,948
Total Funds	2,003	1,378	3,381	10,046

The directors confirm that for the financial period ended 5 October 2015:-

- 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 February 2016 and signed on their behalf by:

.....  
Claudia Goncalves, Treasurer

# Community Foundation for Planetary Healing

## Notes to the Financial Statements

For the year 6 October 2014 to 5 October 2015

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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

## Community Foundation for Planetary Healing

### Notes to the Financial Statements

For the year 6 October 2014 to 5 October 2015

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#### 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

Remuneration for services delivered to the Foundation was paid to three trustees as provided for by Clause 5.3 of the Memorandum of Association. Claudia Conclaves received £1,310; Tessa McKirdy received £300 and Mark Halliday received £110.

Out of pocket expenses totaling £133 were reimbursed to two charity trustees.

### 4. Movement in Restricted Funds

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

	Opening balance	Income	Expenditure	Transfers	Closing balance
	£	£	£	£	£
Children's Project in Brazil	100	-	-	-	100
Santander - Administrator costs	-	4,752	3,474	-	1,278
Holistic Health Project - Awards for All	9,848	-	8,850	(998)	-
Total	9,948	4,752	12,324	(998)	1,378

The transfer of £998 out of the Holistic Health Project is the net position of:

1. A transfer from the fund of the £1,228 being the cost of refurbishing the Yurt that once complete satisfied the restriction and was transferred to the unrestricted fund, and
2. A transfer of £230 unrestricted funding into the fund that was required to complete the project.

## Community Foundation for Planetary Healing

### Notes to the Financial Statements

For the year 6 October 2014 to 5 October 2015

<b>5. Voluntary Income</b>	<b>Note</b>	<b>Unrestricted Funds</b>	<b>Restricted Funds</b>	<b>2015 Total</b>	<b>2014 Total</b>
		£	£	£	£
Donations		10,244	-	10,244	7,486
EVOT		-	-	-	2,000
Awards for All		-	-	-	9,848
Santander		-	4,752	4,752	-
Total		10,244	4,752	14,996	19,334

<b>6. Activities for Generating Funds</b>	<b>Note</b>	<b>Unrestricted Funds</b>	<b>Restricted Funds</b>	<b>2015 Total</b>	<b>2014 Total</b>
		£	£	£	£
Shop sales		305	-	305	330
Various events		2,961	-	2,961	1,208
Total		3,266	-	3,266	1,538

<b>7. Incoming Resources from 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		3,785	-	3,785	2,784
Other (Room rental and Library)		1,486	-	1,486	1,942
Total		5,271	-	5,271	4,726

<b>8. Cost of Activities for Generated Funds</b>	<b>Note</b>	<b>Unrestricted Funds</b>	<b>Restricted Funds</b>	<b>2015 Total</b>	<b>2014 Total</b>
		£	£	£	£
Cost of fundraising		233	-	233	1,254
Total		233	-	233	1,254

## Community Foundation for Planetary Healing

### Notes to the Financial Statements

For the year 6 October 2014 to 5 October 2015

<b>9. Cost of Charitable Activities</b>	<b>Note</b>	<b>Unrestricted Funds</b>	<b>Restricted Funds</b>	<b>2015 Total</b>	<b>2014 Total</b>
		£	£	£	£
Community Initiative & Health					
Project		634	7,266	7,900	2,034
Training		-	-	-	720
Administration		1,477	4,743	6,220	2,446
Establishment		11,845	-	11,845	9,525
Publicity		620	315	935	204
Other costs		2,621	-	2,621	1,156
Depreciation		1,463	-	1,463	1,217
Total		<u>18,660</u>	<u>12,324</u>	<u>30,984</u>	<u>17,302</u>

### 10. Tangible Assets

#### **Equipment and Yurt**

£

#### **Cost**

At 6 October 2014

7,686

Additions

1,228

At 5 October 2015

8,914

#### **Depreciation**

At 6 October 2014

6,469

Charge for the year

1,463

At 5 October 2015

7,932

#### **Net book value**

At 5 October 2015

982

At 6 October 2014

1,217